

WINTERGREEN RESEARCH, INC.

**IT Governance and IT Compliance Market Opportunities,
Strategies, and Forecasts, 2004 to 2009**

IT Governance and IT Compliance



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

www.wintergreenresearch.com

REPORT # SH29821358

376 PAGES

146 TABLES AND FIGURES

2004

\$2,800

CHECK OUT THESE KEY TOPICS

IT GOVERNANCE INFRASTRUCTURE AND APPLICATION MARKET SHARES

IT GOVERNANCE MARKET FORECASTS

IT Organizational Shifting Responsibilities

IT Business Technology Market Driving Forces

IT Governance Industry Overview

IT Financial Manager

IT PROCESS MANAGER

PORTFOLIO MANAGEMENT

CONTROL OVER THE IT DEPARTMENT

MAXIMIZING THE BUSINESS VALUE OF IT

PROJECT SCHEDULING APPLICATIONS

PROCESS MANAGER

DASHBOARDS

BUSINESS INTELLIGENCE

OPEN SOURCE WORKBENCH

PORTAL TECHNOLOGY

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.

Lexington, Massachusetts

www.wintergreenresearch.com

IT Governance and IT Compliance Market Opportunities, Strategies, and Forecasts, 2004 to 2009

IT organizational shifting responsibilities relate to running IT like a business. This means taking the aspects of the business that have come from outsourcing which does run IT like a business with efficiencies and economies of scale to bring those efficiencies in house.

Companies improve IT efficiencies by 30 percent by implementing an IT-MG solution. Successful IT-MG initiatives rely upon an integrated system. Systems need to span the full IT lifecycle. The IT lifecycle encompasses continuous, integrated processes.

Technology spending has been declining over several years. There are multiple signs that enterprises around the world are making long-term and strategic commitments to IT departmental and systems management software solutions that improve productivity. Efficiency is achieved by knowing what is going on in the department, tracking projects, and avoiding duplication.

IT governance business technology market driving forces are an effect of the realization that IT departments can be run more efficiently. Many IT departments are as large as companies or countries. Buyers of systems management software are focused on linking their IT operations and infrastructure with their overall business services.

The IT governance markets relate to running the IT department efficiently. The ability to determine that projects are being implemented once and only once is central to systems capabilities. Testing and management of software are part of the needed functionality. Compliance issues and content management of structured and unstructured information is central to the systems.

Once and only once solutions of problems is central to IT systems efficiency. IT governance and compliance management markets are expected to grow in response to the need to manage IT departments as profit center. These pressures are coming at the same time compliance issues are arising.

Markets for IT governance at \$126.3 million in 2003 are expected to grow to \$1.8 billion by 2009. Markets for IT governance and compliance management at \$408 million in 2003 are expected to grow to \$2.7 billion by 2009.

Companies Profiled

Market Leaders

IBM
Compuware
BMC Software

Market Participants

Computer Associates
Hewlett-Packard
Lawson
Niku
Peoplesoft
Primavera

Empirix
Keynote Systems
Mercury Interactive
Oracle
Planview
SAP

Segue Software

IT Governance and IT Compliance Strategies and Forecasts, 2004-2009

REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND TWENTY-FIFTH* REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT.

YOU MUST HAVE THIS STUDY

IT Governance and IT Compliance Market Opportunities, Strategies, and Forecasts, 2004 to 2009

Table of Contents

IT GOVERNANCE AND IT COMPLIANCE EXECUTIVE SUMMARY

IT GOVERNANCE AND IT COMPLIANCE EXECUTIVE SUMMARY	ES-1
IT Organizational Shifting Responsibilities	ES-1
IT Business Technology Market Driving Forces	ES-3
Internet Business Services Delivery	ES-5
IT Governance Infrastructure and Applications Market Shares	ES-6
IT Governance Market Forecasts	ES-8
Regional Shipments Of IT Governance And IT Compliance Software	ES-11

IT GOVERNANCE MARKET DYNAMICS AND MARKET DESCRIPTION

1. IT GOVERNANCE MARKET DYNAMICS AND MARKET DESCRIPTION	1-1
1.1 IT Governance Business Management Infrastructure Automation Market	1-1
1.2 IT Governance Industry Overview	1-3
1.2.1 Addressing IT Challenges	1-5
1.3 Control Over The IT Department	1-7
1.3.1 IT Organizational Shifting Responsibilities	1-8
1.4 Maximizing The Business Value Of IT	1-10
1.4.1 Resource Planner	1-11
1.4.2 Project Resources	1-13
1.4.3 Evaluate Capacity By Role	1-14
1.4.4 Identify and Track Key Skills and Experience	1-14
1.4.5 Create And Search Skills Hierarchies	1-15
1.5 IT Financial Manager	1-15
1.5.1 Charge-Back Allocations	1-19
1.5.2 Billing and Invoicing	1-19
1.5.3 Cost and Rate Management	1-20
1.6 IT Process Manager	1-21
1.6.1 Process Standards	1-25
1.7 Project Scheduling Applications	1-25

IT GOVERNANCE AND IT COMPLIANCE MARKET SHARES AND MARKET FORECASTS

2. IT GOVERNANCE AND IT COMPLIANCE MARKET SHARES AND MARKET FORECASTS	2-1
2.1 IT Business Technology Market Driving Forces	2-1
2.1.1 IT Business Technology Optimization Products	2-3
2.1.2 IT Business Technology Optimization Companies	2-4
2.1.3 IT Governance Channel Issues	2-8
2.1.4 IT Governance Market Becomes Broader	2-10
2.2 IT Governance Infrastructure and Applications Market Shares	2-11
2.2.1 IT Governance Lifecycle Market Shares	2-15
2.2.2 IT Governance Project and Portfolio Management Market Shares	2-19
2.2.3 IT Governance ERP Market Shares	2-23

2.2.4	IT Governance Business Process Management Compliance Market Shares	2-26
2.2.5	IT Governance Content Management Compliance and Risk Management Market Shares	2-29
2.3	IT Governance Market Forecasts	2-33
2.3.1	IT Governance Lifecycle Market Forecasts	2-36
2.3.2	IT Governance ERP Market Forecasts	2-38
2.3.3	IT Governance Project and Portfolio Management Market Forecasts	2-40
2.3.4	IT Governance Business Process Management Compliance Market Forecasts	2-43
2.3.5	IT Governance Content Management Compliance and Risk Management Market Forecasts	2-46
2.3.6	Sarbanes-Oxley	2-48
2.4	Forecast Of Regional Shipments Of IT Governance and IT Compliance Software	2-51

IT GOVERNANCE AND IT COMPLIANCE SOFTWARE PRODUCT DESCRIPTION

3. IT GOVERNANCE AND IT COMPLIANCE SOFTWARE PRODUCT DESCRIPTION	3-1
3.1 IBM Risk Management	3-1
3.1.1 IBM On Demand Systems Business Activity Monitoring Solutions	3-3
3.1.2 IBM Middleware BPM Software Model	3-3
3.1.3 IBM WebSphere Business Integration	3-4
3.1.4 IBM Business Process BPM Infrastructure	3-6
3.2 Mercury Interactive	3-7
3.2.1 Mercury IT Governance Center	3-8
3.2.2 Mercury IT Governance Dashboard	3-11
3.2.3 Mercury Demand Management	3-13
3.2.4 Mercury Portfolio Management	3-15
3.2.5 Mercury Interactive Program Management	3-18
3.2.6 Mercury Resource Management	3-22
3.2.7 Mercury Financial Management	3-24
3.2.8 Mercury Change Management	3-26
3.2.9 Mercury Time Management	3-28
3.2.10 Mercury IT Governance Foundation	3-29
3.2.11 Digitize IT Business Processes and Enforce Best Practices	3-31
3.2.12 Mercury Portfolio Management Fast Start™	3-32
3.2.13 Mercury IT Governance Center	3-33
3.3 Peoplesoft	3-38
3.3.1 PeopleSoft Service Automation Solution	3-38
3.3.2 PeopleSoft ESA Warehouse	3-43
3.3.3 PeopleSoft® Enterprise Expense Management	3-45
3.4 Niku	3-47
3.4.1 Niku Clarity Modules	3-48
3.4.2 Niku Clarity Control and Predictability	3-51
3.4.3 Niku Clarity IT-Solutions	3-52
3.4.4 Niku Clarity Used to Define the Portfolios	3-52
3.4.5 Niku Clarity Used to Select Optimal Investments	3-53
3.4.6 Niku Clarity Use Scenario Planning to Maximize Return on IT	3-53
3.4.7 Niku Clarity Best Practice Execution of the Portfolio Plan	3-54
3.4.8 Niku Clarity Used to Match Resources to the Portfolio	3-54
3.4.9 Niku Clarity Best Practice Project Planning	3-55
3.4.10 Niku Clarity Real-Time Monitoring for Control and Predictability	3-55
3.4.11 Niku Clarity Document Management, Collaboration, and Business Intelligence	3-56
3.4.12 Niku Clarity™ Eight Modules	3-56
3.4.13 Niku Executive Dashboard for Portfolio Decision Making	3-56

3.4.14	Niku Clarity: Portfolio Manager	3-57
3.4.15	Niku Clarity: Project Manager	3-60
3.4.16	Niku Clarity: Workbench	3-62
3.4.17	Niku Clarity Team Work	3-64
3.4.18	Niku Clarity Scope Change Management	3-65
3.4.19	Niku Clarity: Author Best Practice Methodologies	3-67
3.4.20	Niku Clarity G2000 Architecture	3-76
3.4.21	Niku Clarity: IT Demand Management	3-79
3.5	Primavera	3-80
3.5.1	Primavera Helps The IT Project Office	3-81
3.5.2	Project Management Professionals	3-82
3.5.3	Resource Managers and Team Leaders	3-83
3.5.4	Executive Stakeholders and Extended Project Team	3-83
3.5.5	Team Members	3-83
3.5.6	Primavera Products	3-83
3.5.7	Primavera CIO Dashboard	3-86
3.5.8	Primavera Provides IT Managers With Visibility	3-87
3.5.9	Primavera Capacity Planning	3-88
3.5.10	Primavera Request Management	3-88
3.5.11	Primavera Time Entry	3-90
3.5.12	Primavera Resource Dashboard	3-90
3.5.13	Primavera Collaboration	3-90
3.6	Oracle	3-90
3.6.1	Oracle Configuration Management Pack	3-91
3.6.2	Oracle Business Issue Tracking Capability	3-91
3.7	Lawson	3-93
3.7.1	Lawson Services Automation	3-94
3.8	BMC Remedy	3-96
3.9	Compuware	3-97
3.9.1	Compuware / Changepoint	3-101
3.10	SAP IT Governance	3-101
3.10.1	SAP xApps	3-101
3.11	Planview	3-103
3.11.1	PlanView Assumes Organizations Have Defined Processes	3-105
3.11.2	PlanView Use of Dashboards	3-106
3.11.3	PlanView Establishing IT Governance	3-106

IT GOVERNANCE AND IT COMPLIANCE TECHNOLOGY

4. IT GOVERNANCE AND IT COMPLIANCE TECHNOLOGY	4-1
4.1 IT Governance Programs And Process Control Framework Standards	4-1
4.1.1 Solutions: IT-MG: Assess	4-3
4.1.2 Measure Performance	4-3
4.1.3 Audit Business Value	4-3
4.1.4 Benchmarks	4-3
4.1.5 Project Cost Accounting	4-4
4.1.6 Close the Governance Loop for Continuous Improvement	4-4
4.1.7 Dashboards	4-4
4.2 Portfolio Management	4-4
4.2.1 Robust Planning and Financial Management	4-5
4.2.2 Portfolio Manager	4-5
4.2.3 Project Manager	4-5
4.2.4 Resource Planner	4-6

4.2.5	Financial Manager	4-6
4.3	Process Manager	4-6
4.3.1	Studio Configuration Packages	4-7
4.3.2	Project Scheduling	4-7
4.3.3	Methodologies	4-9
4.4	Portal Technology	4-9
4.4.1	Seamless Integrated Collaboration, Document Management, Portal and Reporting Services	4-17
4.4.2	Provide a Collaborative Environment	4-17
4.5	Dashboards	4-21
4.6	Business Intelligence	4-21
4.7	Open Source Workbench	4-24

APPLICATION MANAGEMENT, APPLICATION DELIVERY, AND IT GOVERNANCE AND IT COMPLIANCE COMPANY PROFILES

5. APPLICATION MANAGEMENT, APPLICATION DELIVERY, AND IT GOVERNANCE AND IT COMPLIANCE COMPANY PROFILES	5-1
5.1 Application Management, Application Delivery, and IT Governance Market Participants	5-1
5.2 BMC Software	5-2
5.2.1 BMC Strategy	5-6
5.2.2 Merger Agreement With Marimba	5-8
5.2.3 BMC Market Directions	5-8
5.2.4 BMC Revenue	5-8
5.2.5 BMC Solutions	5-9
5.2.6 BMC Enterprise Data Management	5-9
5.2.7 BMC Enterprise Systems Management	5-10
5.2.8 BMC Remedy	5-11
5.2.9 BMC Segment Percentage of Total Analysis	5-12
5.3 Computer Associates	5-17
5.3.1 CA Positioning	5-19
5.3.2 Computer Associates Customers	5-20
5.3.3 Computer Associates Revenue	5-21
5.4 Compuware	5-22
5.4.1 Compuware iSTROBE	5-23
5.4.2 Compuware Revenue First Quarter Fiscal Year 2005	5-25
5.4.3 Compuware Software Products And The Application Life Cycle	5-31
5.4.4 Compuware Customers	5-33
5.4.5 Compuware Strategic Positioning	5-34
5.4.6 Compuware Revenues:	5-36
5.5 Empirix	5-39
5.5.1 Empirix Web Monitoring	5-40
5.5.2 Empirix Solutions	5-42
5.5.3 Empirix Distributors	5-43
5.5.4 Empirix Testing And Performance Monitoring	5-44
5.6 Hewlett Packard	5-46
5.6.1 Hewlett Packard Positioning	5-46
5.6.2 Hewlett Packard / Compaq Integration	5-47
5.6.3 HP Products and Services; Segment Information	5-48
5.6.4 Hewlett Packard Imaging and Printing Group	5-48
5.6.5 Hewlett Packard Personal Systems Group	5-50
5.6.6 Hewlett Packard Enterprise Systems Group	5-50
5.6.7 HP Services	5-52

WINTERGREEN RESEARCH, INC.

5.6.8	HP Financial Services	5-53
5.6.9	Hewlett Packard Revenue	5-54
5.6.10	Hewlett Packard Software	5-54
5.6.11	HP Services	5-55
5.6.12	Hewlett Packard Imaging and Printing	5-55
5.6.13	Hewlett Packard (HP) OpenView	5-56
5.7	IBM	5-57
5.7.1	IBM Strategy In The IT Industry	5-59
5.7.2	IBM Capabilities:	5-64
5.7.3	IBM Component Value:	5-67
5.7.4	IBM Business Segments	5-67
5.7.5	IBM Revenue	5-70
5.7.6	IBM Regional Revenue	5-70
5.7.7	IBM Revenue	5-71
5.8	Keynote Systems	5-73
5.8.1	Keynote Web Performance Measurement And Management Services	5-74
5.8.2	Keynote Measurement Services Mange Web Performance	5-75
5.8.3	Keynote Customers	5-77
5.8.4	Keynote Partnerships	5-78
5.8.5	Keynote Acquisitions	5-78
5.8.6	Keynote Customer Experience Management	5-82
5.8.7	Keynote Revenue	5-83
5.8.8	Keynote Business	5-84
5.8.9	Keynote Services	5-84
5.8.10	Keynote Measurement Infrastructure	5-86
5.8.11	Keynote Total Performance Management	5-86
5.8.12	Keynote Web Performance Measurement And Monitoring Services	5-87
5.8.13	Keynote Application Perspective	5-88
5.8.14	Keynote Red Alert Performance Tracker	5-89
5.8.15	Keynote Web Site Perspective	5-89
5.8.16	Keynote Private Agents	5-90
5.8.17	Keynote Data Pulse	5-90
5.8.18	Keynote Network Perspective	5-91
5.8.19	Keynote Enterprise Solutions	5-91
5.8.20	Web Performance Testing And Tuning Services	5-92
5.8.21	Keynote Customer Experience Management Services	5-93
5.8.22	Keynote, The Internet Performance Authority®	5-94
5.9	Lawson	5-96
5.9.1	Lawson Comprehensive Software Suite	5-98
5.9.2	Lawson Software Quarter Revenue	5-100
5.9.3	Lawson Software Revenue	5-101
5.10	Mercury Interactive	5-102
5.10.1	Mercury Interactive Software Pricing Model	5-104
5.10.2	Mercury Interactive Customers	5-105
5.10.3	Mercury Interactive Application Delivery	5-106
5.10.4	Mercury Interactive Application Management	5-106
5.10.5	Mercury Interactive IT governance	5-106
5.10.6	Mercury Interactive Optimization Centers	5-106
5.10.7	Mercury Interactive Cash	5-108
5.10.8	Mercury Interactive Corporation Revenue	5-108
5.10.9	Mercury Interactive Revenues:	5-111
5.10.10	Mercury Interactive International Sales Revenue	5-114

5.10.11	Mercury Interactive 2003 Business Acquisitions and Technology License Agreements	5-115
5.11	Niku	5-116
5.11.1	Niku Customers	5-117
5.11.2	Niku Control and Predictability	5-119
5.11.3	Niku Functional Leadership	5-119
5.11.4	Niku Technology	5-120
5.11.5	Niku Comprehensive Information Technology	5-121
5.11.6	Niku Strategy	5-123
5.11.7	Niku Open Workbench	5-124
5.11.8	Niku Open Workbench Open Source Desktop Application	5-125
5.11.9	Niku Second Quarter License Revenue	5-126
5.11.10	Niku Revenue	5-127
5.12	Oracle	5-127
5.13	Peoplesoft	5-128
5.13.1	PeopleSoft Product Families	5-129
5.13.2	PeopleSoft Revenues	5-132
5.14	Planview	5-132
5.14.1	Planview Customers	5-133
5.15	Primavera	5-134
5.16	SAP	5-135
5.16.1	SAP mySAP Business Suite Experience, Knowledge, and Technology for Maximizing Business	5-136
5.16.2	SAP Second Quarter 2004 Revenues	5-137
5.16.3	SAP Second Quarter and Six Months 2004 Revenue	5-139
5.16.4	SAP Customers and Partners	5-141
5.16.5	SAP acquires A2i	5-142
5.17	Segue Software	5-143
5.17.1	Segue Software Customers	5-143
5.17.2	Segue Software Delivering Quality Optimization Solutions	5-144
5.17.3	Segue Software 2004 Second Quarter	5-146
5.17.4	Segue Software, Costco, and Keynote Systems Web Site Reliability	5-147
5.17.5	Segue Partnerships	5-147
5.17.6	Segue Geographic Sales	5-148
5.17.7	Segue Services Revenue	5-152

List of Tables and Figures**IT GOVERNANCE AND IT COMPLIANCE EXECUTIVE SUMMARY**

Table ES-1 IT Organizational Responsibilities	ES-1
Table ES-2 IT Governance Business Technology Market Driving Forces	ES-4
Table ES-3 Worldwide IT Business Management Infrastructure Automation Market Shares, First Half 2004	ES-7
Table ES-4 Worldwide IT Governance Market Forecasts, 2004-2009	ES-9
Table ES-5 Worldwide IT Governance and Compliance Management Market Forecasts, 2004-2009	ES-10

IT GOVERNANCE MARKET DYNAMICS AND MARKET DESCRIPTION

Table 1-1 IT Infrastructure Systems	1-2
Table 1-2 Information Technology (IT) Organizational Challenges	1-3
Table 1-3 Addressing IT Challenges	1-6
Table 1-4 Modular Aims For Achieving Control Over IT Department	1-7
Table 1-5 Modular Functions That Provide Control Over IT Department	1-8
Table 1-6 IT Organizational Responsibilities	1-9
Table 1-7 IT Lifecycle Encompasses Continuous, Integrated Processes	1-10
Table 1-8 Resource Planner Components	1-12
Table 1-9 Resource Planner Benefits	1-15
Table 1-10 Functionality Of IT Financial Manager Software	1-17
Table 1-11 Features Of IT Financial Manager Software	1-18
Table 1-12 Workflow Notifications Features	1-22
Table 1-13 Process Manager Software Processes	1-24

IT GOVERNANCE AND IT COMPLIANCE MARKET SHARES AND MARKET FORECASTS

Table 2-1 IT Governance Business Technology Market Driving Forces	2-2
Table 2-2 Market Driving Forces	2-5

Table 2-3	2-7
IT Governance Market Positioning	
Table 2-4	2-9
IT Governance Channel Issues	
Figure 2-5	2-12
Worldwide IT Business Management Infrastructure Automation Market Shares, First Half 2004	
Figure 2-6	2-13
Worldwide IT Business Management Infrastructure Automation Market Shares, 2003	
Table 2-7	2-14
Worldwide IT Infrastructure, Application Management, Application Delivery, IT Governance, Compliance, and Risk Management License Revenue Market Shares, 2003 and First Half 2004	
Figure 2-8	2-16
Worldwide IT Governance Lifecycle Management Market Shares, First Half 2004	
Figure 2-9	2-17
Worldwide IT Governance Lifecycle Management Market Shares, 2003	
Table 2-10	2-18
Worldwide IT Governance Lifecycle License Revenue Market Shares, 2003 and First Half 2004	
Figure 2-11	2-20
Worldwide IT Governance Project and Portfolio Management Market Shares, First Half 2004	
Figure 2-12	2-21
Worldwide IT Governance Project and Portfolio Management Market Shares, 2003	
Table 2-13	2-22
Worldwide IT Governance Project and Portfolio Management License Market Shares, 2003 and First Half 2004	
Figure 2-14	2-24
Worldwide IT Governance ERP Management Market Shares, First Half 2004	
Figure 2-15	2-25
Worldwide IT Governance ERP Management Market Shares, 2003	
Table 2-16	2-26
Worldwide IT Governance ERP License Revenue Market Shares, 2003 and First Half 2004	
Figure 2-17	2-27
Worldwide IT Governance Business Process Management Compliance Market Shares, First Half 2004	
Figure 2-18	2-28
Worldwide IT Governance Business Process Management Compliance Market Shares, 2003	
Table 2-19	2-29
Worldwide IT Governance Business Process Management License Revenue Market Shares, 2003 and First Half 2004	
Figure 2-20	2-30
Worldwide IT Governance Content Management Compliance Market Shares, First Half 2004	
Figure 2-21	2-31
Worldwide IT Governance Content Management Compliance Market Shares, 2003	
Table 2-22	2-32
Worldwide Content Management Compliance and Risk Management License Revenue Market Shares, 2003 and First Half 2004	
Figure 2-23	2-34
Worldwide IT Governance Market Forecasts, 2004-2009	
Figure 2-24	2-35
Worldwide IT Governance and Compliance Management Market Forecasts, 2004-2009	
Table 2-25	2-36
Worldwide IT Infrastructure, Application Management, Application Delivery, IT Governance, Compliance, and Risk Management License Revenue Market Shares, Market Segment Forecast, 2004-2009	

Figure 2-26	2-37
Worldwide IT Governance Lifecycle Market Forecasts, 2004-2009	
Table 2-27	2-38
Worldwide IT Governance Lifecycle Market Forecasts, 2004-2009	
Figure 2-28	2-39
Worldwide IT Governance ERP Market Forecasts, 2004-2009	
Table 2-29	2-40
Worldwide IT Governance ERP Market Forecasts, 2004-2009	
Figure 2-30	2-42
Worldwide IT Governance Best of Breed Project and Portfolio Management Market Forecasts, 2004-2009	
Table 2-31	2-43
Worldwide IT Governance Best of Breed Project and Portfolio Management Market Forecasts, 2004-2009	
Figure 2-32	2-45
Worldwide Business Process Management Compliance and Productivity Enhancement Market Forecasts, 2004-2009	
Table 2-33	2-46
Worldwide Business Process Management Compliance and Productivity Enhancement Market Forecasts, Software License, Dollars, 2004-2009	
Figure 2-34	2-47
Worldwide Content Management Compliance and Risk Management Market Forecasts, 2004-2009	
Table 2-35	2-48
Worldwide Content Management Compliance and Risk Management Market Forecasts, 2004-2009	
Table 2-36	2-49
Competitive Factors In Enterprise Content Management	
Figure 2-37	2-52
IT Governance Regional Market Shares, 2003	
Table 2-38	2-53
IT Governance and Compliance Management Regional Market Shares, 2003	
Figure 2-39	2-54
IT Governance Regional Market Shares, 2009	
Table 2-40	2-55
IT Governance Regional Market Shares, 2009	

IT GOVERNANCE AND IT COMPLIANCE SOFTWARE PRODUCT DESCRIPTION

Table 3-1	3-9
Mercury Interactive IT Governance Center Functions	
Table 3-2	3-10
Mercury Interactive IT Governance Center Offerings	
Table 3-3	3-12
Mercury IT Governance Dashboard Functions	
Table 3-4	3-14
Mercury Interactive Demand Management Functions	
Table 3-5	3-16
Mercury Interactive Portfolio Management Issues Addressed	
Table 3-6	3-17
Mercury Portfolio Management Functions	
Table 3-7	3-18
Mercury Interactive Portfolio Management Features	

Table 3-8	3-19
Mercury Interactive Program Management Issues Addressed	
Table 3-9	3-20
Mercury Interactive Program Management Functions	
Table 3-10	3-21
Mercury Interactive Project Management Issues	
Table 3-11	3-23
Mercury Resource Management Issues	
Table 3-12	3-23
Resource Management Functions	
Table 3-13	3-25
Mercury Interactive Financial Management Issues	
Table 3-14	3-25
Mercury Interactive Financial Management Functions	
Table 3-15	3-26
Mercury Change Management Issues	
Table 3-16	3-27
Change Management Functions	
Table 3-17	3-29
Mercury Time Management Functions	
Table 3-18	3-31
Mercury IT Governance Foundation Functions	
Table 3-19	3-34
Mercury Interactive IT Governance Center Capabilities	
Table 3-20	3-35
Mercury Interactive IT Governance Center core products	
Table 3-21	3-37
Mercury Interactive IT Governance Center Dashboard Capabilities	
Table 3-22	3-39
PeopleSoft Service Automation Solution ESA Solutions and Product Modules	
Table 3-23	3-41
PeopleSoft Enterprise Service Automation (ESA) for IT Advantages	
Table 3-24	3-42
PeopleSoft Service Automation Solution ESA for IT Product Modules	
Table 3-25	3-44
PeopleSoft ESA Warehouse Features List	
Table 3-26	3-46
PeopleSoft Project Management Functions	
Table 3-27	3-47
Niku IT- Governance Systems Positioning	
Table 3-28	3-48
Niku Clarity Modules	
Table 3-29	3-57
Niku Clarify Portfolio Manager Key Benefits	
Table 3-30	3-59
Niku Clarify Portfolio Manager System Features	
Table 3-31	3-60
Niku Clarity: Project Manager Key Benefits	
Table 3-32	3-63
Niku Clarity Workbench Functions	
Table 3-33	3-66
Niku Clarity Scope Change Management Analysis Types	

Table 3-34	3-68
Niku Methodology Functions	
Table 3-35	3-69
Methodology Authoring Functions	
Table 3-36	3-71
Niku Work Breakdown Structure Elements	
Table 3-37	3-72
Niku Work Breakdown Structure Key Steps In Methodology Element Authoring	
Table 3-38	3-74
Niku Work Breakdown Structure Key Steps In Methodology Deliverables Assessment	
Table 3-39	3-80
Primavera Information Technology Target Market Solutions:	
Table 3-40	3-82
Primavera IT project team positioning	
Table 3-41	3-84
Primavera Functions	
Table 3-42	3-85
Primavera Governance IT Functions For Executives	
Table 3-43	3-86
Primavera Governance IT Executive Alignment Functions	
Table 3-44	3-87
Primavera IT Manager Visibility Benefits	
Table 3-45	3-89
Primavera Request Management IT visibility Functions	
Table 3-46	3-93
Lawson Software Modules Used To Automate The IT Department	
Table 3-47	3-99
Compuware Questions Addressed On IT Governance & Portfolio Management	
Table 3-48	3-104
Planview IT Portfolio Management Benefits	
Table 3-49	3-107
PlanView Specific Process Changes Facilitated Establishing IT Governance	

IT GOVERNANCE AND IT COMPLIANCE TECHNOLOGY

Table 4-1	4-1
IT Governance Programs And Process Control Framework Functions	
Table 4-2	4-8
Desktop Applications For Project Scheduling	
Table 4-3	4-10
Portal Technology System Benefits	
Table 4-4	4-11
Portal Technology System Features	
Table 4-5	4-12
Portals Productivity Improvement Functions	
Table 4-6	4-14
Point-And-Click Portlet Configuration Setting Features	
Table 4-7	4-15
Personalizing Portlet Environment	
Table 4-8	4-16
Framework Uses For Portals	

Table 4-9	4-18
Collaborative Environment Functions	
Table 4-10	4-20
Document Management Functionality In Core Services Functions	
Table 4-11	4-22
Business Intelligence Report Systems Functions	
Table 4-12	4-24
End-User Modules Integrates Foundation Functions For The Intellectual Assets Of The Enterprise	

APPLICATION MANAGEMENT, APPLICATION DELIVERY, AND IT GOVERNANCE AND IT COMPLIANCE COMPANY PROFILES

Table 5-1	5-3
BMC Software Positioning	
Table 5-2	5-4
BMC Systems To Permit IT Administrators To Manage IT From A Business Perspective	
Table 5-3	5-18
Computer Associates (CA) solutions brands	
Table 5-4	5-26
Compuware Fiscal Year 2005 Highlights	
Table 5-5	5-32
Compuware Software Products And The Application Life Cycle	
Table 5-6	5-34
Compuware IT Portfolio Solutions Functions	
Table 5-7	5-35
Compuware Product Set Functions	
Table 5-8	5-41
Empirix Integrated Web Application And Component Testing Modules	
Table 5-9	5-45
Empirix Positioning	
Table 5-10	5-47
Hewlett Packard Positioning Goals And Priorities	
Table 5-11	5-56
Hewlett Packard (HP) OpenView Solutions	
Table 5-12	5-57
IBM Strategic Positioning	
Table 5-13	5-60
IBM Industries Targeted	
Table 5-14	5-64
IBM Capabilities	
Table 5-15	5-76
Keynote Web Performance Measurement Services Features	
Table 5-16	5-80
Keynote Customer Experience Management Solutions Functions	
Table 5-17	5-95
Keynote Service Launched	
Table 5-18	5-96
Lawson Solutions	
Table 5-19	5-97
Lawson Solutions Positioning	
Table 5-20	5-103
Mercury Interactive BTO Positioning	

Table 5-21	5-107
Mercury Interactive Alliance Partners	
Table 5-22	5-118
Niku Customers	
Table 5-23	5-122
Niku Information Technology Management And Governance (IT-MG) Solution	
Table 5-24	5-124
Niku Strategy	
Table 5-25	5-131
PeopleSoft Integration Functionality	
Table 5-26	5-135
Primavera Project Portfolio Management Functions	
Table 5-27	5-145
Segue Solutions Functions	

ABOUT THE COMPANY

WINTERGREEN RESEARCH, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

ORDER FORM

Return To: WinterGreen Research, Inc.
6 Raymond Street
Lexington, MA 02421 USA
Phone: (781) 863-5078 --- Fax: (781) 863-1235 or (781) 860-0897

PLEASE ENTER MY ORDER FOR:

IT Governance and IT Compliance Market
Opportunities, Strategies, and Forecasts
2004-2009

-ALL REPORTS ARE AVAILABLE IN EITHER PRINT OR PDF-

PDF

PRINT

___ ENCLOSED IS MY CHECK FOR \$2,800 FOR SINGLE COPY, \$3,800 FOR WEB SITE POSTING

___ PLEASE BILL MY COMPANY USING P.O. NUMBER _____

___ PLEASE CHARGE MY MASTERCARD/VISA/AMERICAN EXPRESS___

CARD NUMBER _____ EXP. DATE _____

If charging to a Credit card you may e-mail the order form, but not the card information

Fax or Call with credit card information - Do not send card number as e-mail - You may send the order as e-mail

___ ADDITIONAL COPIES, @ \$375 (EXTRA COPY PRICE IN EFFECT ONLY WITH INITIAL ORDER)

NAME _____ TITLE _____

SIGNATURE _____

COMPANY _____ DIVISION _____

ADDRESS _____

CITY _____ STATE /

ZIP _____

TELEPHONE _____

FAX _____

EMAIL _____

PLEASE NOTE: RESIDENTS OF MASSACHUSETTS AND CONNECTICUT MUST INCLUDE APPROPRIATE SALES TAX

SUBSCRIBERS OUTSIDE THE UNITED STATES MUST PROVIDE PREPAYMENT IN U.S. FUNDS