

Mountains of Opportunity

Picture by Susan Eustis
LEXINGTON, Massachusetts (June 22, 2011) – WinterGreen Research announces that it has a new study on Business Process Management (BPM) Software Market Shares and Forecasts, Worldwide, 2011-2017. The 2011 study has 775 pages, 245 tables and figures. Business Process Management (BPM) is evolving more sophisticated software that works in cloud computing environments, allowing users at every level to achieve self-provisioning and automate processes that involve collaboration.
IBM is the market leader in BPM with a suite of products that improve every year. IBM is able to invest in the product set, improving it as the customer base grows ever larger, spreading the cost of software implementation across the large customer base.

IBM is providing a BPM best practice solution that is the de-facto industry standard. The software that comprises IBM BPM foundation has been carefully selected from the IBM software portfolio to support each stage of the BPM life cycle, which includes four stages: IBM software portfolio’s ability to support each stage of the BPM life cycle -- model, assemble, deploy, and manage -- is built out with component software that matches the defined stages.

The hybrid computing systems provide dramatic improvement in cost structures, creating the ability to use Business Process Management systems along with Services Oriented Architecture (SOA) in a wide variety of situations. The line of business can launch applications into the cloud without having to worry about the underlying hardware platform.

BPM software lets a user move from defining a problem, creating a model that describes the solution, assembling code components to address the solution, deploying the solution, and managing the results as the solution is implemented over time. In this manner software represents a complete middleware solution to rapidly respond to changing market conditions.

Business process management software is achieving resurgence as enterprises realize that automation of processes is key to market growth. Innovation depends on process automation. Software is critical to enabling solutions. Software is a strategic business asset used in every industry at every level. Software is necessary to provide automated process.

Business processes and business process management techniques are becoming accepted. But the interpretation is different. There are a wide range of business processes that are appropriate for different business domains. Some manufacturing business domains focus on very strictly controlled processes. They require a very consistent outcome. Customer service oriented domains focus on very free-form, unstructured processes. They require varied and customized outcomes.

Enterprise leaders are deploying increasingly intelligent applications software, middleware, systems and products. There is an accelerating adoption of innovation in the enterprise. Technology is enabling effective change. Change is highly dependent on the ability to manage effective software development and achieve delivery of systems.

Collaboration is key to BPM program success. BPM programs require collaboration and coordination at all levels and phases. BPM suites are human-centric. BPM suites support collaboration. Leading vendors are delivering sophisticated social and Web 2.0 features.

Process collaboration has evolved to a whole new level. Vendors have weaved social networks and collaboration into their BPM frameworks, providing sophisticated user profiling, process feeds, process discovery wikis, and social harvesting capabilities.
Process repositories are a core function. A BPM single process project can generate dozens of iterations of a single process model. Process professionals have a difficulty in maintaining numerous versions of a process model across different environments. To resolve this, IBM and Software AG — are responding by providing comprehensive process repositories that allow teams to merge and track changes to process models.

Complexity is an issue in the BPM market. Platforms are used to address complexity by combining components to create systems. The impact of platforms is significant because applications can be developed using standard specifications. A portion of developer workload is effectively eliminated because of the inherent technology services provided by the platform itself.

Complexity of the underlying IT technologies is a central issue for both EAI and BPM. Highly skilled software engineers start with defined business requirements and painstakingly translate them into a technology model. Building a data map is a central part of this process. The data map usually looks like a spider web. It maps the movement of information from one process to another.

Orders move to invoicing, billing and collections. Orders also move to inventory and manufacturing and shipping. Shipping needs to be interconnected to billing systems. Each company is a little different in how this works across departments.

To implement a BPM system, software engineers pick and choose from the available disjointed EAI technologies. They draw a map of how the systems will be implemented. Reusable components are leveraged as much as possible. Translation of the EAI technology perspective into actual code generally involves a services engagement. The key point here is the complexity of the underlying technologies. Complexity of the underlying technologies drives significant translation challenges between the business perspective and the technology. Significant hurdles exist for BPM developers. Translation complexity dramatically impacts ongoing changes and management of applications. Applications are expensive to create and deploy and even more costly to maintain. BPM is trying to fit into the application software market.

To modernize in the manner consultants would like to implement enterprise architecture as strategy, attention has to be paid to core platform architecture. In core enterprise architecture slides, every consultant says the enterprise must move away from silos. They describe this as a journey. The globally integrated enterprise implements consolidated systems that manage applications across the silos.

If the systems architecture implements silos, then there is no way to move away from the silos. The platform and the architecture do make a difference. The silos are inside the technology, then of course the journey will go on and on.

If instead, to adopt highly virtualized systems that permit integration, systems modernization, and very high systems utilization requires an architecture that supports that. When many processes run simultaneously as components on the large enterprise server system, then the migration to modernized IT systems is facilitated by the existing infrastructure.
One of the remarkable aspects of the SOA solutions are that they permit users to work across software segments to achieve significant insight into their IT automated process. BPM supports SOA in this regard.

According to Susan Eustis, principal author of the study, “BPM components are evolving a repository structure and the ability to be reused. In this manner they are becoming more mature. BPM based process manages collaboration more effectively. It handles complexity more effectively. Software architectures are significant because optimized technology makes the BPM systems work better. Because the component architecture supports software modules that can be put together in a variety of different ways, the line of business architects achieve competitive advantage while lowering costs. Code reuse is facilitated, benefitting the businesses that implement BPM.”

BPM markets at $ 2.3 billion in 2010 are anticipated to reach $ 5.5 billion by 2017. Market growth is a result of demand for automated business process that permits flexibility in response to changing business conditions. New systems are appropriate for the line of business to use to launch functionality in a cloud in a manner that is self-provisioned. Hybrid computing systems are positioned to support cloud computing. BPM provides this as application middleware that permits IT to manage change.

WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Global Information Info Shop, Market Research.com, Research and Markets, Bloomberg, and Thompson Financial.
Companies Profiled

Market Leaders

IBM  Microsoft
Oracle  SAP Frankfurt Stock Exchange
Software AG  PegaSystems
Progress Software  Tibco

Market Participants

5. (BPM) Company Profiles
Active Endpoints  EMC  Pallas Athena
Adobe Systems  Fabasoft  PNMsoft
ActionBase  FinalWire  Polymita
AgilePoint  Fiorano  Progress Software
Axway  Fujitsu  RedHat
BancTec  Global 360  SAP
BizAgi  HandySoft  Savvis
BMC  Hewlett Packard (HP)  Singularity
CA / 3Tera  Information Builders  Software AG
Cap Gemini Inc.  Intalio  Whitestein Technologies
Cordys  inubit  Workday
Deloitte Touche  Newgen


Report Methodology

This is the 473th report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health

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equipment, and energy. Automated process and significant growth potential are a priorities in topic selection. 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.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

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 participant 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. We establish accurate market forecasts based on economic and market conditions as a base. Use input/output ratios, flow charts, and other economic methods to quantify data. Use in-house analysts who meet stringent quality standards.

Interviewing key industry participants, experts and end-users is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2010. With 2010 and several years prior to that as a baseline, market projections were developed for 2011 through 2017. These projections are based on a combination of a
consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective.

The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes reference to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.
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ABOUT THE COMPANY

WinterGreen Research, research strategy relates to identifying market trends through reading and interviewing opinion leaders. By using analysis of published materials, interview material, private research, detailed research, social network materials, blogs, and electronic analytics, the market size, shares, and trends are identified. Analysis of the published materials and interviews permits WinterGreen Research senior analysts to learn a lot more about markets. Discovering, tracking, and 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.

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