Magic Quadrant for Business Process Management Suites

Gartner's 2010 Magic Quadrant updates our evaluation of the top 25 vendors in this market, based on Gartner's top four usage scenarios for BPMSs.

WHAT YOU NEED TO KNOW

This research updates Gartner's 2009 "Magic Quadrant for Business Process Management Suites." Our usage-scenario-based evaluation approach (introduced in 2009), our weighted criteria and our definition of a business process management suite (BPMS) are unchanged. However, some new vendors have been added and some have been dropped.

Gartner's updated 2010 Magic Quadrant represents one of several tools that clients can use to evaluate vendors in this market. It also depicts the relative strengths of the top 25 vendors that offer multiregional, cross-industry BPMSs that interest Gartner clients and nonclients the most. These vendors account for most of the spending in the BPMS market. However, clients should also consider other vendors that did not meet our inclusion criteria, such as those specializing in industry-specific processes or in particular geographic locations.

The position of a vendor in the 2010 BPMS Magic Quadrant directly relates to its ability to support the top four usage scenarios that drive buyers to invest in a BPMS (rather than alternative forms of application infrastructure), and to the vendor's support for characteristics of the BPMS "sweet spot," as defined by Gartner. Those usage scenarios, in order of buyer interest (based on anecdotal evidence from our client inquiries), are:

- Support for a continuous process improvement program

- Implementation of an industry-specific or company-specific process solution

- Support for a business transformation initiative

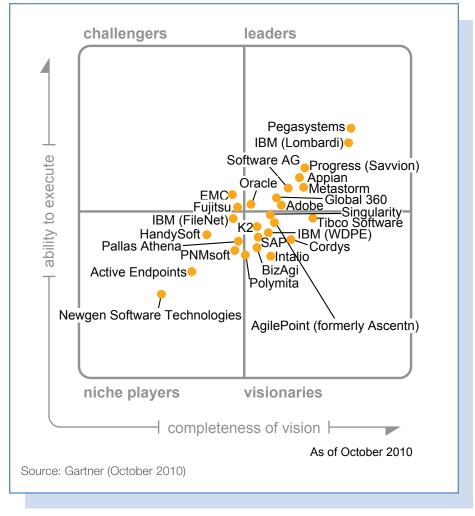- Support for a process-based, service-oriented-architecture (SOA) redesign

Business process management (BPM) pure-play vendors have the longest history of model-driven process execution (as opposed to code-based execution). Gartner's opinion is that model-driven is the best way to enable business and IT professionals to manage and change processes collaboratively, especially in a volatile business environment. For this reason, many of these vendors continue to lead our BPMS Magic Quadrant.

Gartner

Most of the large middleware and application infrastructure vendors also recognize the importance of this shift to business professional empowerment in the process improvement life cycle, and they continue to strengthen their BPMS products. Nevertheless, some of the products from the large middleware vendors do not yet address all the BPMS usage scenarios – even in vision – like best-of-breed vendors do. The difference is most notable in the overall user experience, which is not as seamless and unified. Sheer marketing and sales can't overcome this weakness. (For more details, see the specific strengths and cautions below for all included vendors.) Partly for this reason, IBM acquired Lombardi and Progress Software acquired Savvion early in 2010.

Buyers should not assume that only Leaders offer the best products. Vendors in the Leaders quadrant are *market* leaders, and a strong product is just one criterion that influences this positioning. Buyers are encouraged to heavily weight the resource interaction patterns (across people, systems and information) of their intended usage scenarios, using our descriptions as guidelines, and to match products to those requirements. Evaluations of the technologies included in the suite are insufficient to determine best fit. Instead, Gartner heavily weighted the cohesiveness of the suite and the support for all the possible resource interaction patterns needed in our four usage scenarios. We recommend that clients use this same approach (see Figure 1).

Figure 1. Magic Quadrant for Business Process Management Suites

Source: Gartner (October 2010)

As of October 2010

MAGIC QUADRANT

Interpreting the 2010 Magic Quadrant Graphic

This Magic Quadrant research[1,2,3] analyzes the BPMS market using multiple criteria – and "product" is just one of them. As in 2009, the 2010 BPMS Magic Quadrant graphic reflects our usage-scenario-based evaluation approach, with an emphasis on support for the BPMS "sweet spot." The BPMS sweet spot is most distinguished by support for business role involvement throughout the process improvement life cycle, and by the need for frequent changes to the process design and to in-flight work items (we describe these characteristics further in "Two Factors That Help Identify the BPMS 'Sweet Spot'").

Prior to 2009, our product score (an execution axis criterion) reflected our evaluation of the technologies included in the suite. However, in our 2009 and 2010 Magic Quadrants, we frame our judgments about each product in terms of its support for Gartner's top four BPMS usage scenarios – and especially our BPMS sweet spot. This change was made because a BPMS is a *suite* – i.e., it is an integrated set of composition technologies. The individual composition technologies are often well-proven on their own. Since we are evaluating a *suite*, we consider how well these technologies work together, and how easy it is for someone (a *composer*) to use the complete environment. A BPMS is a well-established product category, so the technologies included in vendor products in this market tend to be quite similar. As a result of standards and trends leading to the commoditization of some lower-level middleware

technologies, BPMS products are more differentiated based on the integration of the technologies and on the resulting user experience, rather than based on purely technological strengths. The composition technologies that are included and the way they support the required capabilities differ. These differences are most pronounced when the suite is evaluated as a whole, rather than having its contributing technologies evaluated as "piece parts." Our usage-scenario-based approach better differentiates the products by matching the suites to our clients' BPM project and program requirements.

We considered more than 60 providers worldwide for our 2010 Magic Quadrant, and 25 met the inclusion criteria (see below). Thus, the Magic Quadrant graphs the relative strengths of the vendors offering multiregional, cross-industry BPMSs that are of greatest interest to Gartner clients and nonclients around the world. In other words, we evaluated the top portion of the worldwide market of providers. Thus, the number of Leaders and the overall dot pattern reflect our intentional inclusion of the top 25 vendors. Leaders address all four usage scenarios. Niche Players excel at one or two only. Challengers and Visionaries vary in the breadth and depth of their support for the four usage scenarios.

Because we included the top 25 providers, the clustering of the dots may seem to indicate a maturing market. However, this market has nuances that are not readily apparent from the graphic. For example, we have included a mix of .NET and Java products from all over the world. Small and midsize enterprises, especially outside the U.S., often prefer a Microsoft-centric solution, and have BPM requirements and priorities that are very different from those of large enterprises. Furthermore, Microsoft's mass-market approach sets buyers' expectations for pricing, sales channels and skills. Outside the U.S., many of the smaller BPMS providers use indirect sales channels, including resellers, partners, consulting firms and system integrators. Many of these BPMS providers have gained large customer bases by spreading themselves across multiple geographic locations at a relatively low cost. In addition, Intalio's leverage of open-source technologies and SAP's NetWeaver BPM offer two more approaches for satisfying BPM requirements. SAP's BPMS is primarily meant to extend SAP applications. Given all these nuances, we encourage clients to read the entire Magic Quadrant report and call Gartner to further discuss their specific needs.

Finally, readers should bear in mind that this is a *market* analysis, not simply a *product* analysis. "Product" is only one of many criteria applied. Therefore, organizations should not conclude that products from *all* the vendors in the Leaders quadrant are the best products for their needs. In fact, some products from the Niche Players quadrant (as well as some of the Visionary vendors) are architecturally more unified, and, thus, deliver a stronger BPM user experience than those of some of the Leaders (although a Niche Player or Visionary product is less proved in the market overall).

Market Overview

A trend we first observed in 2008 has continued into 2010: More organizations are adopting BPM as a discipline and scaling up their efforts to establish BPM as an enterprise program – not just to apply its methods and technologies to one-off projects. Thus, a market-leading BPMS must support BPM throughout the business process improvement life cycle. Key elements of the BPM discipline supported by a BPMS are:

- Optimizing the performance of end-to-end business processes that span functions, as well as processes that might extend beyond the enterprise to include partners, suppliers and customers

- Making the business process visible (i.e., explicit) to business and IT constituents through business process modeling, monitoring and optimization

- Keeping the business process model in sync with process execution

- Empowering business users and analysts to manipulate a business process model to modify instances of the process

- Enabling the rapid iteration of processes and underlying systems for continuous process improvement and optimization

Since 2000, the financial services industry (including retail and investment banks, as well as insurance) has led the aggressive adoption of BPMS technology. Many leading financial services institutions are consolidating their projects into a more coordinated BPM program. BPM has mostly been embraced in service industries, where human productivity and effectiveness are especially critical to process performance.

Over the years that we have tracked this market, one of the biggest changes has been the increase in the number of buyers looking to support continuous process improvement, and to drive business transformation with BPM. For example, in 2007, our anecdotal evidence found that only two out of 10 Gartner clients expressed these requirements, compared with five out of 10 in 2008. In the first half of 2009, this number dropped back to two or three. However, since late summer 2009, the number of organizations pursuing continuous process improvement or business transformation initiatives based on BPM has climbed back to five or six out of 10[4]. We conclude that this trend reflects the changing nature of business itself in response to globalization. Furthermore, in our September 2010[5] primary research survey on BPM adoption, respondents said they expected the following benefits from:

- Continuous process improvement – 53%

- Transformational – 7%

- Incremental gains – 20%

- Substantial benefits – 19%

- Don't know – 1%

Even during the 2009 economic crisis, BPM initiatives (and BPMS products) continued to receive funding. Gartner estimates that the size of the BPMS market in 2009 totaled $1.9 billion in revenue, compared with $1.6 billion in 2008 – an increase of 15%.

A number of BPMS vendors that have evolved from a BPM pure-play heritage continue to lead the market in capabilities and vision, but large middleware and software infrastructure vendors have greatly expanded their market presence. The vision of vendors such as Oracle and SAP aligns more closely with the business process platform (BPP) concept than the four BPMS usage scenarios – so far. We expect that the usage scenarios for a BPMS will evolve as application infrastructure and composition technologies continue to evolve into model-driven integrated composition environments that support businesses' desire to formalize BPPs.

Microsoft is not represented in this Magic Quadrant because it does not offer a BPMS; rather, Microsoft relies on partners to use its Windows Workflow Foundation (WF) technology and supplement its application platform with BPM functionality. This analysis includes a number of strong Microsoft partners.

Gartner's view is that the BPMS market is poised to finally become a mainstream market. In the past 12 months, some significant acquisitions have occurred. Specifically, Progress acquired Savvion to enter this market, which is complementary with its other product lines. IBM acquired Lombardi to compete effectively in the "sweet spot" for BPMSs. Software AG acquired IDS Scheer to extend and support its growth strategy, which depends heavily on BPM adoption. We anticipate that at least one other pure-play BPMS provider will be acquired or go public in the next six to nine months. The motivation for each of these acquisitions was for the acquiring companies to expand into areas where they were weak. The financial and R&D backing of these pure-plays reinforces their importance in the future.

Market Definition/Description

Our 2010 BPMS Magic Quadrant builds on Gartner's approach to evaluating vendors and products to meet the needs of buyers, as reflected in the macrolevel usage scenarios introduced in 2009. This focus better reflects an essential ingredient in the appeal of a BPMS – that business professionals can see work in progress (via models), and manage and execute dynamic business processes without exclusive reliance on IT professionals to make desired changes to the process specification. Also, business professionals can collaborate with IT professionals more easily and consistently throughout the process improvement life cycle by using models to provide a shared language – and, thus, improved understanding and direct access (within security rights) to manipulate the assets.

In 2010, the collaboration theme extends to the process itself. Traditionally, the BPMS supported modeled processes where all the paths were known and illustrated in the model. Structured processes have worked well to glean significant benefits for organizations, and we expect this to continue. As processes start serving knowledge workers who need and desire collaborative and unstructured processes to attain desired outcomes, the BPMS will have to grow to support unstructured processes. In addition to measuring process outcomes by adding collaboration capabilities that will reach out to others inside and outside the organization for additional knowledge, the BPMS will have to assist in discovering better practices, and guiding workers into more effective behaviors and desirable outcomes.

Top Four BPM Usage Scenarios

At a macrolevel, BPMS buyers are looking for technology solutions to support their BPM projects or programs. In most cases, buyers want to create a business process abstraction layer over their applications and software services (hosted on an application infrastructure). Gartner has observed four main usage scenarios in BPMS buying behavior. As in 2009, these four scenarios form the basis of our definition of the 2010 BPMS market.

The following provides an overview of the four usage scenarios (which are not mutually exclusive).

Implementation of an Industry-Specific or Company-Specific Process Solution: The business (supported by the IT organization) tends to buy a BPMS to improve business performance through broader and better coordination of a specific mission-critical process. This process is often unique to the industry or to the differentiation of the enterprise. As such, it is not commercially available. Furthermore, the business seeks a rapid implementation of the new application – ideally, built as an extension and unification of established applications and data. The end result is a composite application reflecting the end-to-end process view, not just an integration of data and transactions. Differences between this usage scenario and traditional composite applications include the following:

- To sustain its differentiation, the business desires an easy method for changing the process and work in the process, and the model-driven approach of a BPMS addresses this need.

- Visibility into the process and visibility into the work in the process are highly desired capabilities.

Support for a Continuous Process Improvement Program: In this scenario, the business and IT organizations regularly collaborate on technology decisions to deliver management visibility and agility for key processes. The BPM program is led by the director of process improvement and a governance council (or equivalent). The business process competency center offers the methodologies and services to support the execution of the BPM program. A BPMS is selected to provide a stable platform, with integrated services to use to deliver continuous process improvements.

Support for Business Transformation Initiatives: Senior business executives drive buying decisions in this usage scenario. They want to make a "game changing" play by rethinking an entire business process. The ability to create shared process understanding across stakeholders (through modeling, analysis and simulation), to synchronize execution with the model, and to support rapid innovation makes the BPMS approach highly attractive for delivering a company differentiation. These buyers highly value the enhanced collaboration between business and IT. This scenario can overlap with the others above. For example, a re-engineered process may incorporate SOA, and will need to follow a continuous process improvement program to sustain its differentiation.

Support for Process-Based SOA Redesign: Here, the IT organization drives enthusiasm for BPM among business leaders as a way to prioritize its efforts to rationalize and modernize the application portfolio for SOA. The IT organization buys a BPMS as a model-driven environment that uses explicit process models to:

- Drive greater business involvement in decisions that prioritize its implementation of an SOA.

- Enable the re-engineering of software assets for an SOA.

- Deliver process transparency and change control for business and IT roles.

Common Requirements Across All Four Usage Scenarios

The following process management requirements are typically desired by buyers in all four usage scenarios:

- **Use of Business-Oriented Models to Foster Shared Understanding:** The enterprise wants to overlay its application assets with a business-level representation of the end-to-end processes supported by the software assets. In addition to establishing a shared (business and IT) understanding of the process design, business leaders also want visibility into work as it advances through the end-to-end process. We call this "pipeline visibility" – i.e., the ability to see the flow of work as it progresses across the enterprise. Business leaders want views of the process and the work in the process that are tailored specifically to their level of comprehension and sensibility. These views (or "models") have value well beyond the design phase. They can be used for reporting, analysis, monitoring, simulation and ongoing optimization. Models should reflect business role perspectives, and selectively avoid the complex technology implementation details that are more relevant to IT professionals.

- **Delivery of a Unified Approach to Process Resource Management:** The business requires a unified approach for coordinating manual efforts, system-automated tasks and information flows (often documents, forms, and other semistructured and unstructured content) – all as contributing resources to the process – rather than managing them separately and uniquely. Managers want the ability to manage the interactions across these resources to improve business performance results[6].

- **Easier Exception Handling:** The enterprise wants a better approach for exception handling (which is typically a costly and manual effort) in conjunction with the normal "happy path" process. Within a BPMS, rules are an attractive approach to abstract the business policies that can be applied to exception conditions across multiple process contexts. Other techniques may be used, too. The BPMS's easier approach to addressing continuous improvement creates an environment with far fewer unanticipated exceptions. What used to be seen as "exceptions" become alternative execution sequences that are business-justified, visible and linked to the overarching "parent" process.

- **Prebuilt Process Content:** The enterprise seeks some prebuilt business process content (which is sometimes seen as a distillation of industry best practices) to incorporate into its model-driven composition environment, and to accelerate its learning and implementation. The enterprise chooses a BPMS, rather than a more traditional coded application approach or commercial off-the-shelf offering, to coordinate a process that is unique to its industry or differentiates the enterprise within the industry. Often, the buyer has some existing software assets that it wants to leverage into a new automated process. The model-driven approach to process composition enables the buyer to leverage and extend existing assets, and delivers faster and more frequent process innovations than are possible through IT-only-delivered, code-based changes.

- **Timely Process Monitoring, Reporting, Insight and Manipulation:** The enterprise wants visibility into work-in-progress, insight into how specific in-flight transactions affect process performance indicators, and, perhaps, the capability to adjust work items and transactions for optimal outcomes. Adjustments range from changing the data for the business transaction, to dynamically handling exceptions, to changing the process – for example, by eliminating tasks, adding extra approval steps, redirecting the work item, skipping ahead or applying alternative business rules.

- **Easier Ability to Change the Process and Adjust In-Flight Work Items:** The enterprise wants an easier way to change and innovate processes, especially those that need to change often (four or more times a year). Change can be triggered by internal factors, such as a desire to innovate, the need for a better understanding of the process and a continuous improvement method, or by external factors. The higher frequency of change drives the requirement for an easier approach to making changes. There is a need to enable business roles, with appropriate access rights, to make some types of changes – such as user interface (UI) design and human workflow changes – with little to no IT professional assistance. The graphical representation of processes and process artifacts enables easier access to and manipulation of the resources performing the work, and to the work itself. Changes made should be synchronized with the explicit (visible) model so that the business's understanding of how work is happening is always accurate. In other words, work in progress is easily migrated to reflect any changes made to the design, and changes to in-flight work items are immediately communicated to stakeholders and process participants. This ensures that the visible model always reflects the latest approach to work. (Gartner describes this as "round-tripping.")

- **Greater Participation of Business-Oriented Roles Throughout the Process Improvement Life Cycle:** The roles and responsibilities of business and IT professionals in the process improvement life cycle are shifting toward greater involvement for business stakeholders. Business roles want to be involved throughout the life cycle, not just during requirements gathering at the beginning and user acceptance testing at the end (see Note 1).

- **Ability to Manage Long-Running Processes:** The enterprise wants to better coordinate long-running business processes in which instances of the work often extend for hours, days or even months. This requires context information to be maintained for long periods of time.

- **Cross-Boundary Coordination:** The enterprise wants to enable better coordination of work and business transactions that cross multiple boundaries. These include organizational boundaries, national boundaries (due to different taxes and regulations in different countries), boundaries between facilities, boundaries between trading partners, system boundaries and information boundaries. Enterprises also want the ability to coordinate the progression of work without loss of integrity or data degradation.

- **Interaction Management:** Buyers want technology to better support the efforts of knowledge workers in process areas that are more dependent on human insight and expertise – that is, business process domains that are more unstructured than structured. The objective is to reveal the more unstructured work patterns to discover emerging next practices. For this reason, BPMS adoption has been strongest in the service industries (such as banking, insurance, telephone companies and other utilities), where the "product" is largely very similar across providers, and in which higher customer value is created more through human interactions and expertise in servicing the customer than through the product itself.

Description of a BPMS

BPMSs are the leading integrated composition environment (ICE) to support BPM and enable continuous improvement. A BPMS is an integrated collection of software technologies that enables process transparency, and, thus, better management of the business process, as well as work in the process. ICEs will be differentiated by the degree to which the composition technologies form a set of

highly integrated composition technologies as opposed to *loosely related* ones. Well-integrated composition environments (aka, "suites") have integrated management and administration consoles, a common security model, a common metamodel, integrated installation procedures and documentation, shared technical support, and a consistent look and feel in the UIs. A good "suite" represents the greatest degree of component integration because it provides a consistent and unified user experience across all the technologies contained within the suite, extending throughout the entire process improvement life cycle.

In addition, functionality within a suite is not duplicative. Although there may be multiple engines and servers within the suite, they address distinct needs and interoperate. A well-integrated suite "feels" like a single product to the individual using it, regardless of his or her role, because of its architectural and metamodel cohesion. Finally, solution artifacts move fluidly across the phases of the life cycle that the suite supports.

The best BPMSs use explicit process models to coordinate the interactions among people, systems and information as equally important aspects of work. This model-driven approach loosely couples the physical resources used at execution time with the design of the process to increase flexibility. At runtime, the BPM engine (i.e., a process execution and state management engine) acts as an overarching orchestrator, coordinating the end-to-end processes and including all resources involved, human and machine, regardless of whether software resources are created in the BPMS's design environment or in other platforms.

Mapping BPMS Functionality to Buyer Needs

Our definition of a BPMS emphasizes the aggregation of composition technologies to support the capabilities needed for specific types of usage scenarios. Our usage scenarios reflect buyers' intentions for *deploying* capabilities (more than *developing* capabilities) to support their business needs. A composition environment (as opposed to a development environment), such as a BPMS, enables a composer to *assemble and compose* the solution more than specify how the components work. A component and the technology used to specify its behavior will make the task at hand easier or more difficult.

Inclusion and Exclusion Criteria

Vendors considered for inclusion in this Magic Quadrant had to meet all of the following criteria:

- The vendor's product fulfills all capabilities we have listed for a BPMS, and Gartner recognizes the product as a BPMS.

- The vendor delivers these capabilities as general-purpose technology that is appropriate for any process, and does not specialize the product horizontally or vertically in some business domain or industry.

- The vendor primarily markets and sells its product to end-user buyers looking for technology to address one or more of the BPMS usage scenarios, independent of any other lines of business. (Products that are predominantly delivered via consulting engagements or are sold on an OEM basis are not included.)

- The vendor provides the above-described capabilities as a suite. Some functionality can be sourced from partners, although the BPMS vendor must be the single point of contact for customer support.

- The vendor must conduct business on two continents through a local, direct presence (i.e., local employees, not partners).

- The product interests Gartner clients, or Gartner analysts feel that clients should take note of it. We use Dataquest market share data, Gartner client inquiry data, and Gartner BPM conference attendees' responses to questions as indicators of market interest.

- The product regularly competes with the offerings of other vendors represented in this Magic Quadrant.

- The vendor must provide references that demonstrate industry and geographic diversity. References should have deployed process solutions using the complete suite. Deployments do not have to be production-level; however, production-level deployments are generally considered to be stronger references. The number of customers using the complete suite is considered in the evaluation.

For each vendor, the product version that was evaluated is indicated.

Vendors Considered, but Not Included

Some providers did not qualify for inclusion, even though they may have a complete BPMS. Clients should consider vendors that are not reviewed here when their process management requirements (including future requirements) are best matched by these vendors' offerings. Below, we list some additional vendors we considered:

- ActionBase

- Axway

- BancTec

- Everest

- Fabasoft

- inubit

- Whitestein Technologies

- Vitria Technology

Note that Ascentn was not dropped from the Magic Quadrant – rather, the vendor changed its name to AgilePoint.

Added

The following new vendors were added to the 2010 Magic Quadrant:

- Active Endpoints

- BizAgi

- HandySoft

- Newgen Software Technologies

- Pallas Athena

- PNMsoft

Dropped

For every Gartner Magic Quadrant, we review and adjust our inclusion criteria as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor appearing in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. The following vendors that appeared in our 2009 Magic Quadrant have been dropped from the 2010 edition:

- AuraPortal

- Ultimus

Evaluation Criteria

Ability to Execute

Vendors must deliver strong functionality in all areas of capability listed above to achieve long-term leadership in the BPMS market. We also heavily weighted **sales execution/pricing**, which is a key measure of market reach and commercial viability. Beyond the major software vendors in this market, there are few public companies. Therefore, the smaller, private, best-of-breed vendors must demonstrate strong new license revenue growth to gain market share and sustain their leadership positions.

Marketing execution, along with sales execution/pricing, creates "mind share"; thus, we have weighted these criteria heavily.

Overall viability is an important criterion for buyers. However, standards and runtime interoperability with software infrastructure products, such as application servers and portals, increase buyers' comfort with smaller, best-of-breed BPMS suppliers. Thus, we weighted this criterion as "standard."

Market responsiveness and track record is also weighted as "standard"; all vendors ship multiple releases or versions in a year.

BPMS enables nontechnical people to play key roles in process improvement, so we heavily weighted the **customer experience** criterion (see Note 2), which encompasses business-user friendliness, a single-product experience and customer support.

Finally, the **operations** criterion reflects our evaluation of the management team, and how well the company works with partners and customers (see Table 1).

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	Standard
Sales Execution/Pricing	High
Market Responsiveness and Track Record	Standard
Marketing Execution	High
Customer Experience	High
Operations	Low
Source: Gartner (October 2010)	

Note 2. Customer Experience Criterion

In this criterion, we also reflect our evaluation of the overall user experience of the process improvement life cycle in a continuous improvement mentality. We considered products in terms of the experience of various roles, including authors and composers, developers, business process analysts, business process architects, and even process participants.

Completeness of Vision

Completeness of vision in the BPMS market considers a vendor's vision and plans for addressing BPMS buyer needs in the future. We evaluated vendors' completeness of vision by assessing how well their products and services meet the BPMS usage scenarios described above. However, with so many vendors competing, a vendor's plan for enhancing the product and meeting the needs of new roles continues to be an important selection criterion.

Purchasing decisions are typically made jointly between business and IT professionals. The **marketing strategy** and **sales strategy** criteria go hand-in-hand with the vendors' understanding of the market. If market understanding isn't strong, then a vendor's message (marketing strategy) and value proposition (sales strategy) will not resonate with buyers.

Because there are so many competitors, we heavily weighted **offering (product) strategy** as the criterion that most reflects the vendor's vision for R&D. We asked whether the vendor will develop additional features itself, leverage open-source technology, partner, or acquire capabilities. A vendor's product strategy also affects the customer experience.

In the **business model** criterion, we considered whether the vendor is funded adequately and staffed with individuals who we believe can execute the product vision.

We focus on the general-purpose technologies in a BPMS. Nevertheless, vendors have an opportunity to distinguish themselves and deliver more value to customers by supporting industry-specific standards and by providing industry-specific content, for example. We also rated **innovation** as extremely important for long-term differentiation.

Finally, BPMS adoption is strongest in North America, although Europe, Australia, South America and Central America are also growing, so we weighted **geographic strategy** as "standard" (see Table 2).

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Standard
Sales Strategy	Standard
Offering (Product) Strategy	High
Business Model	Standard
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	Standard
Source: Gartner (October 2010)	

Leaders

Leaders offer products and services that best enable all four usage scenarios, and the Leaders have customer references for each. These vendors relentlessly focus on increasing the participation of business roles in process improvement efforts by enabling explicit, model-driven approaches, rather than traditional coding. Leaders' products and services especially focus on business process analysts working alongside process owners to improve and even transform processes. Products from the Leaders enable the highest level of collaboration among business and IT professionals, from discovery, through the design and modeling phases, and to execution and ongoing optimization. References particularly value process and work-item visibility and rapid adjustment. Nevertheless, very few organizations give extensive change control rights to business users (a characteristic of the "sweet spot" for BPMS usage in Gartner's "Four Corners Framework"[7]). The

obstacle, however, is not technological; rather, culture, politics and deep process knowledge for understanding the implications of a change are still the inhibitors.

The Leaders' products support an iterative process improvement method in which the artifacts (outputs) created at each phase of the process improvement life cycle move very smoothly (if not seamlessly) from one phase to another. Products from vendors with a BPM pure-play heritage (such as Pegasystems, IBM [Lombardi], Progress [Savvion], Appian and Adobe) still come closest to delivering automated, model-driven, round-trip behavior, where changes made to the model are immediately executed, thus blurring the distinction between design and runtime. These products provide the most fluid and unified user experience, as well as the greatest support for dynamic BPM[8]. Because the model is visible at all times and live (aka, executable), processes can be flexible without sacrificing management visibility and control.

In addition, as a group, Leaders exhibit superior sales and marketing execution. Many Leaders exhibit strong innovation in their products, business models, and consulting and educational services. Many of these vendors have introduced new software as a service (SaaS), cloud offerings and business process outsourcing alliances, and are developing their partner ecosystems to support BPPs. We anticipate that these vendors will continue to be Leaders as interest in BPMSs continues to grow, and as companies expand investments in continuous process improvement and formalize their BPPs.

Since our 2009 Magic Quadrant, Oracle and Adobe have moved into the Leaders quadrant. Oracle's recently released BPMS 11g rationalizes duplicate functionality that Oracle had as a result of acquisitions; it also introduces new components and provides a unified service component architecture (SCA) and OSGi-Alliance-compliant platform. Oracle's demonstration of our evaluation scenario and early feedback from beta users have impressed us. Nevertheless, there are few real proof points yet, given the newness of the release.

Adobe references demonstrate some of the most interesting case studies of how combining information content (not just documents) with human interactions and automated activities can deliver a very engaging and differentiating customer experience. Adobe has grown its BPM customer base quietly, under the radar of most of its competitors, yet in a big way.

Software AG's webMethods version 8 is a comprehensive and integrated set of application integration and middleware (AIM) products that addresses multiple requirements. Due to its release in December 2009, during our evaluation period for this Magic Quadrant, there was limited field level production experience with the new BPMS version. The best capability introduced in version 8 of webMethods' BPMS is the inclusion of CentraSite in the suite packaging. CentraSite provides the unified metadata management platform for all components of the platform. XSLT maps, BPEL scripts, WSDL service interfaces, ARIS models, canonical message formats, key performance indicators, user interface elements, policies and any other metadata artifacts generated or used by the webMethods components can be stored in CentraSite, and, from there, be managed from a life cycle perspective.

Metastorm and Global 360 are the only Microsoft-centric BPMS providers in the Leaders quadrant. Microsoft loyalists prioritize their requirements for BPM a bit differently from users that focus on Java Platform, Enterprise Edition (Java EE) tools. In particular, the ability to integrate with Microsoft Office SharePoint Server, BizTalk Server, SQL Server and Microsoft Office are key evaluation points.

Unlike other Microsoft-centric BPMS providers in this Magic Quadrant, Metastorm's strategy is to acquire technologies and services that broaden its offerings; enable it to sell beyond traditional, midmarket, Microsoft-loyalist enterprises; and enable it to compete more effectively in large, global enterprises. As Metastorm continues to offer strong ease of use and strong functionality across the process improvement life cycle, it is increasingly seen as a competitor to Java-centric providers, especially Appian and IBM (Lombardi).

Global 360's current leadership team has implemented an updated strategy and product road map that emphasizes persona-based access to capabilities in the process improvement life cycle. The resulting user experience and interaction model is advanced, especially among Microsoft .NET BPMS providers. In addition, a renewed focus on its Microsoft partnership is delivering big benefits in sales momentum and marketing for SharePoint-content-centric usage scenarios.

Challengers

Our few Challengers this year are strong companies with good products. Since the 2009 Magic Quadrant, EMC and Fujitsu have made major changes in the alignment of their BPMS products with their organizational structures. Fujitsu reorganized its operations outside Japan to improve synergies among its hardware, software and service organizations. For both vendors, we believe their organizational alignment impacts their overall BPM market visibility and brand awareness, albeit for different reasons.

EMC's BPM products are treated as complementary to its other product lines. For EMC, content is still king and process is the adjunct. EMC approaches this market primarily by cross-selling and upselling its enterprise content management (ECM) customers with its BPMS. Its sales model for BPM depends heavily on consulting and system integration (C&SI) partners, which deliver broad solutions that include BPM and Documentum. With its heritage of a leading ECM product, EMC has developed its BPMS to support case-management-style work (a complex style of processes) better than many other vendors. However, EMC references are largely still doing content-centric processes, and are not fully applying BPM disciplines that are consistent with our BPMS usage scenarios.

For Fujitsu, its culture and organizational alignment constrain the marketing and sales of its BPMS. Interstage BPMS is a smaller revenue-generating product within Fujitsu's overall global business. As such, it hasn't captured enough management attention at the corporate level. Furthermore, growth in the worldwide BPMS market has largely been from North America and Europe, with more recent expansion into Singapore and Latin America. From recent visits with our Asia/Pacific regional clients, the overall interest in and understanding of BPM in Japan and Asia/Pacific, beyond older process management approaches, is in its infancy. We think these combined issues significantly affect the corporate view of BPM. The lack of strong corporate commitment to this market and to the

paradigm shift inhibits Fujitsu from becoming a Leader in the global BPMS market, despite strong technology and good customer references.

Visionaries

In general, Visionaries are innovators. Thus, the Visionaries quadrant in any Magic Quadrant is often the one with the greatest degree of change from year to year. This year, BizAgi is a new addition to the Magic Quadrant, while Cordys, Polymita, Singularity and AgilePoint (formerly Ascentn) have improved their market presence considerably since 2009 and continue to deliver innovations. Intalio and SAP also continue their Visionary status.

BizAgi has gained significant market share in Latin America, a market that is largely underserved for BPM. BizAgi's product is exceptionally intuitive for business roles, yet powerful enough to create process management solutions that orchestrate human, system and information resource interactions. The company's free BPMN-1.2-based modeler, its cost-effective Xpress Edition, and its "model once, execute anywhere" architecture (with .NET and Java EE engines provided) have contributed to its growing base of customers.

Singularity, AgilePoint, Cordys and Polymita have all executed well since our last Magic Quadrant and expanded their market presence, while continuing to innovate. Among the .NET providers, Singularity and K2 have strong support for case management processes. K2 integrates with and leverages SharePoint 2010 capabilities better than the other Microsoft-based competitors in this Magic Quadrant. Singularity also launched LiveAgility, a cloud-based BPMS offering, has adjusted its strategy to focus on some of the leading-edge capabilities, and is committed to advancing process maturity. Its ASAP methodology is one of the best BPM methods we've evaluated (not to be confused with SAP's implementation methodology by the same name).

AgilePoint continues to focus on transforming traditional programming-intensive tasks into model-driven aspects for process composition. Its AgileExtender Framework enables further levels of abstraction to separate process management aspects such as reporting needs, service-level agreements and organizational models. This layering technique keeps the process flow model simple and more comprehensible. Layered models can be used to expose process control aspects to the most appropriate roles. More than other vendors, AgilePoint has grown significantly in China and the Asia/Pacific region, which are underserved.

Polymita's version 6 delivers many new capabilities since our last evaluation, including a BPMN, Web-based modeler, a cloud-based platform-as-a-service (PaaS) package, and a new tool (FreeFlow) to manage unstructured processes and to discover process patterns.

Cordys' best innovations recently are in its cloud offerings and partnerships for process content. However, to become a global competitor, it has to expand geographically.

SAP continues to focus its BPM efforts on NetWeaver BPM, rather than on the cross-component BPM (ccBPM) element within NetWeaver Process Integration (PI – which will be stabilized, not enhanced), thereby extending its value to SAP-centric customers. In 2H10, SAP plans to release a new Business Process Library (BPL) as a common process layer across all Business Suite and BPM composites. The BPL will use the existing Solution Manager and Business Process Repository of transactions, documentation and configuration information. In 2011, SAP plans to connect the BPL to NetWeaver BPM for full customer extensibility.

Intalio continues to have a very unique business model that appeals to cost-conscious buyers, especially throughout the economic crisis. Its unique, low-cost business model (which leverages open-source technologies, Web-based marketing and lead generation, and subscription-based licensing and pricing), compared with the norm for this enterprise software market, contributes to its appeal to governments, academia, research/scientific organizations and other extremely cost-conscious buyers. Its newer cloud-based offerings have enabled Intalio to expand its market and industry presence.

Tibco and IBM (for its WebSphere BPMS) moved down from Leaders to Visionaries in this review period. Tibco did not advance its iProcess offering to keep up with the market. It perhaps took advantage of a slower economy to invest in its newly announced BPM product, ActiveMatrix BPM, and to prepare for a return to growth as the economy picks up. Although ActiveMatrix BPM includes some very appealing new technologies, as well as improved integration across Tibco assets to deliver a more unified and better user experience, the product was released to the market too late in our research process to be evaluated. Similarly, a new release of iProcess, which is primarily a consolidation of point improvements since v.11, is in the planning phase and was not available for review.

IBM continues to express a broad and innovative vision for BPM, linked to its "Smarter Planet" campaign. IBM also continues to invest heavily in BPM-enabling technologies, and added Lombardi (a Leader) to its offerings earlier in 2010. However, IBM's definition of its BPM suite is inconsistent with Gartner's definition (see above and Note 3). Therefore, in 2010, Gartner decided to evaluate three IBM offerings that the market (as we define it) recognizes as BPMSs: WebSphere Lombardi Edition, WebSphere Dynamic Process Edition (WDPE) and IBM FileNet Business Process Manager (see Note 4). Of these, WDPE v.7.0 was evaluated to be a Visionary. To date, we find few organizations using the full combination of WDPE components (five pieces) in production and in a fashion consistent with our BPMS usage scenarios.

Note 3. IBM WebSphere BPM-Enabling Technologies

IBM encourages its customers to adopt its BPM-enabling technologies in various configurations from its portfolio of WebSphere-branded products. WebSphere BPM-enabling technologies are implemented as individual products (e.g., WebSphere Process Server), as IBM-recommended bundles (e.g., WDPE) and in customer-specific combinations. Consequently, it is difficult to find customers that have the same configuration of products and use them in a manner consistent with our defined usage scenarios.

Note 4. IBM's Multiple Positions in the Magic Quadrant

As stated, Gartner has positioned IBM with three entries in the 2010 Magic Quadrant (see Figure 1). Using multiple entries for a single vendor within a Magic Quadrant is an uncommon option, but it is allowed by our methodology. In this specific case, Gartner and IBM hold different definitions of a "BPMS," and, while that is certainly acceptable, Gartner's definitional criteria must guide the construction of the Magic Quadrant. Therefore, we have positioned IBM with three offerings because that's how we see those offerings being viewed in the marketplace and in competitive situations. IBM holds a different view – that its offerings should be viewed as a single BPMS – and states that its BPMS strategy intends to:

- Protect customer investments in existing and new IBM BPMS deployments.

- Support BPM capability integration.

- Continue offering a single voice to the customer through a unified sales channel.

- Ensure an approach to product development, and a BPMS road map that includes a continued focus on open standards support and integration, which address unique client use cases.

Niche Players

Given our approach to selecting vendors to include in this analysis, Niche Players are generally new to this market or new to our Magic Quadrant, having achieved significant-enough market awareness to be in the top 25 vendors that we considered. HandySoft, Active Endpoints, Pallas Athena, Newgen and PNMsoft are all new entrants into this Magic Quadrant.

Pallas Athena is a European vendor that has been growing quietly, albeit largely, in the Netherlands. It has the best technology and visualization we've seen for automated process discovery, and also handles the case management process style exceptionally well. With approximately 85% of its customers in the Netherlands, Pallas Athena has only expanded into the global BPMS market in the past 12 months or so.

Active Endpoints (a Java EE product) comes to this market from the perspective of IT developers more than business roles. Active Endpoints is enjoying success, mostly in Gartner's Process-Driven SOA Redesign usage scenario and in project implementations of an industry-specific or company-specific process solution. Unlike many of the competitors in this market, Active Endpoints offers low-cost entry points into BPM technologies, thereby enabling customers to learn and grow at their own rate with BPM-enabling technologies. This aspect of its business model contributes to Active Endpoints often competing with Intalio's on-premises enterprise BPMS.

HandySoft's heritage is Microsoft-based human workflow, but this is rapidly changing. Thus, its product has strong support for unstructured activities. Many HandySoft customers are in the government sector (in the U.S. and beyond) and have acquired its products through a partner. Its version 11.5, evaluated here, is a much more complete BPMS than past versions, and can orchestrate system and human activities. However, few customers with which we have spoken, including references, have taken advantage of these capabilities yet. Most are still using the product as a human workflow tool, not as a BPMS. Thus, for this analysis, we found that v.11.5 is not yet sufficiently field-proven for our four usage scenarios.

IBM's FileNet BPM product was evaluated independently of IBM WDPE and IBM WebSphere Lombardi Edition. Although it is a complete BPMS, since FileNet was acquired in 2006, IBM has positioned the BPM product as appropriate for content-centric processes, and has put more marketing muscle and development into its WebSphere offerings. Customers, including references, view IBM FileNet Business Process Manager as an enterprise-class document management and workflow technology, not as an enterprise-class BPMS.

The most important reason why we evaluated Newgen as a Niche Player is because its customers typically do not evaluate Newgen's BPMS to support their use in delivering process improvement projects. Rather, based on our research and conversations with Newgen customers, they buy OmniFlow as an enterprise document management (EDM) and workflow solution, or they buy a specific process solution (one of our usage scenarios) that Newgen consultants build for them. Although OmniFlow is available and sold as a product on its own (consistent with our inclusion criteria), it is more typically installed as part of a process solution that Newgen consultants deliver as part of a professional service engagement. Newgen is using its own BPMS to give it advantages for meeting its customers' needs (such as faster solution delivery times). However, its customers are not yet selecting the BPMS platform per se; rather, they buy a solution that happens to be built on a BPMS. Nevertheless, this is largely a reflection of the BPM market in Newgen's target geographies and may change over time, especially as Newgen continues to promote BPM as a discipline and market its BPMS.

Vendor Strengths and Cautions

Active Endpoints

This analysis pertains to ActiveVOS 7.1.

Strengths

- Active Endpoints is strong in the integration and programming arenas of SOA development tools, and delivers a strong set of features for SOA and Web services orchestration.

- ActiveVOS has a good Eclipse-based SOA service development environment that is well-respected in the Java development community.

- ActiveVOS includes a good Web services directory.

- Active Endpoints has invested heavily in providing a new, more business-friendly human workflow environment.

- Active Endpoints offers very attractive pricing and licensing.

Cautions

- Support for business roles (aka "citizen developers") is a new and emerging development priority for ActiveVOS.

- Active Endpoints is a small, private, venture-capital-backed vendor that is transitioning from the SOA application development tool market to the BPMS market.

- As a recent entrant into this market, Active Endpoints has proof points in two of our four BPMS usage scenarios – i.e., those oriented toward IT control over the process improvement life cycle.

Adobe

This analysis pertains to Adobe LiveCycle Enterprise Suite 2 (ES2) v.9.

Strengths

- The product is highly appealing, with a visually rich integration of documents, rich Internet applications (RIAs), unstructured content in the context of a business process, and rule-based, customized security and personalization.

- Adobe's differentiation for its BPM product is to provide process management capabilities and a rich, interactive customer experience. LiveCycle supports collaborative and unstructured, visually intuitive processes very well.

- UI designers can author a UI once, capture it as an XML document and have it automatically rendered in a variety of formats (e.g., PDF, RIA and HTML).

- LiveCycle ES2 integration with Adobe AIR and the use of PDF enable process participants to work online or offline.

Cautions

- Although Adobe has strengthened its focus on its enterprise business and on the LiveCycle product family, market awareness of Adobe as a BPMS vendor remains low.

- Given Adobe's presence in the forms market, customers often view LiveCycle ES2 as a good product for visually engaging forms-based workflow, and do not pursue continuous process improvement initiatives.

- Customers looking to deploy Adobe LiveCycle ES2 in internal IT shared-service centers, and partners looking for a SaaS platform provider, should be aware that Adobe LiveCycle ES2 does not support a full multitenant; however, partners and clients have successfully deployed multitenant solutions.

- Exploitation of Adobe's advanced UI technology requires user experience consultants. Customers will be challenged to find such skills. Adobe Professional Services has an insufficient number of individuals, so Adobe has to ramp up system integrator partnerships in this area.

AgilePoint (formerly Ascentn)

This analysis pertains to AgilePoint BPMS v.5.0.

Strengths

- AgilePoint is a true, model-driven .NET BPMS with a clean and open architecture. It enables the support of dynamic processes throughout the entire Microsoft software stack, including BizTalk Server, SharePoint Server, Windows WF, Microsoft Office and Visual Studio. Its metadata-driven IT asset abstraction framework can be used to process-enable system activities into AgileParts as well as dynamic human activities called AgileWorks. AgileParts and AgileWorks can be assembled and configured at the process layer to create directly executable processes.

- AgilePoint's modeler is Visio; it is the actual .NET composition environment, not simply BPMN stencils that are converted. This approach builds on the business user's experience and comfort with this tool.

- AgilePoint is a preferred partner of Microsoft, which entitles AgilePoint to direct Microsoft R&D; thus, new technologies from Microsoft are easily exploited and integrated (such as the Windows Communication Foundation and .NET frameworks). AgilePoint's close relationship with Microsoft is contributing to significant product growth.

- AgilePoint customers are some of the most advanced BPM organizations we find – which is especially unusual among Microsoft-centric, midsize companies. Customer references use AgilePoint with mission-critical processes and broad deployments.

Cautions

- As a small company, AgilePoint concentrates its resources on core product functions. However, functions beyond core capabilities, such as governance over process assets and simulation and optimization, are weak. Customers may also need to supplement AgilePoint with a third-party rule engine.

- AgilePoint has a small professional service team; it relies more on service providers for solution delivery, consulting and BPM transformation services.

- AgilePoint has increased its ease of use recently, but more needs to be done to allow business professionals to do more work themselves, starting with collaborative processes.

Appian

These comments refer to Appian Enterprise v.6.1.

Strengths

- Appian Enterprise v.6.1 is one of the most user-friendly products in this market, and enables business users to take control of almost every aspect of a BPMS offering.

- Appian Enterprise is one of the few BPM products that provides a 100% thin-client architecture for design time and runtime. Its tightly integrated environment provides a seamless user experience for each component. With this unique architecture, Appian has a complete BPM SaaS offering: Appian Anywhere.

- Appian has identified the strength of a repository-based enterprise architecture tool beyond the simple transfer of process models, and, therefore, it has embarked on a deep relationship with Mega, one of the leaders in the business process analysis (BPA) market.

- Appian Anywhere (with Appian 6 as the core technology) sets the bar for BPM in the cloud. Appian has used the cloud to win business and retain clients that want to be free from operations.

Cautions

- Appian's aggressive growth strategy – which has led to a 67% increase in overall sales this year – will put pressure on the organization to deliver on this strategy, and could result in some locations having limited support.

- Clients have expressed difficulty in creating reports from the closed internal in-memory database.

- The limited number of big C&SI partners hinders Appian's ability to support multinational BPMS projects.

BizAgi

This analysis pertains to BizAgi version 9.

Strengths

- BizAgi delivers a very strong, BPMN-based, model-driven composition environment. Its strong architecture enables structured data to be handled at a higher level of model abstraction than many other products in this market.

- BizAgi has a successful go-to-market strategy through free downloads, university adoption and a standards basis.

- BizAgi is the most established Latin-America-based "pure play" BPMS provider.

- BizAgi is one of the only vendors with Java-based and Windows-based versions.

Cautions

- BizAgi is functionally less complete compared with other leading pure-play BPMS tools (e.g., rules and simulation/optimization).

- BizAgi is a small, albeit growing, private vendor trying to compete on a global scale.

- As is to be expected of a newer product, users report various weak areas, including the forms designer, the integration layer, documentation, and few skilled consultants.

Cordys

This analysis pertains to Cordys Business Operations Platform (BOP) v.4.

Strengths

- Cordys has a strong product with a modular architecture and some unique features: organization models, business calendars, graphical case management, repository views and access, and support for master data management (MDM).

- Cordys Process Factory (CPF) is a hosted, multitenancy SaaS offering that targets businesses and Web developers that want to develop simpler workflows, rather than full process management systems. CPF is helping to build market awareness of Cordys. The vendor relies on partners to host and deliver solutions.

- Cordys has a strong market understanding and product vision for a business-oriented operational platform for managing processes in real time.

- Cordys' middleware technologies, which support its BPMS, are strong in their own right. Customers can single-source much of their application infrastructure technology needs, as well as their BPMS needs.

- BOP is one of the few natively cloud-enabled, full multitenant cloud platforms. (It is available as a cloud-based PaaS from Cloud Harbor and Capgemini.)

Cautions

- Cordys has few references using its complete BPMS.

- UIs throughout the product are functional, but basic in look and feel; they affect intuitiveness and ease of use, especially for less-technical roles. Generated UIs are also average in look and feel. Cordys will have to continue to add ease of use to the core BOP platform to successfully compete with the leading BPMS vendors.

- To expand market share and mind share, Cordys must attract more partners to the platform while continuing to expand direct sales. This is key to its international expansion.

- In October 2009, Cordys transitioned its Benelux professional service practice to CSC. Consulting assistance (for example, on architectural choices, process design and domain expertise, and change management services) is generally not yet available beyond CSC's Benelux practice.

EMC

This analysis pertains to EMC Documentum xCelerated Composition Platform (xCP) v.1.

Strengths

- EMC has done a good job integrating pieces of its BPMS with a Web 2.0 UI (called TaskSpace) that enables business professionals to more easily manage dynamic processes, and to enable collaborative processes.

- EMC is one of the few BPMSs that supports case-management-style processes well, and leverages content for knowledge workers.

- EMC has many system integrators and consulting firms as partners on a worldwide basis.

- EMC's large presence in the storage market provides a significant number of cross-sale opportunities.

Cautions

- In a crowded market, awareness of EMC as a BPMS competitor is low, relative to others in this Magic Quadrant. BPM is not a highlighted product line and sits below the ECM theme.

- References with which we spoke do not yet use all of EMC's BPMS components to support BPM initiatives. Many EMC customers exploit EMC's BPMS for content-centric workflows, rather than exploit its capabilities to support the entire process life cycle.

- Some of EMC's sales force and partners are less trained on best practices for implementing BPM than they are on ECM and workflow. Buyers need to be clear about their needs and assess consultants for BPM methodology and BPMS implementation experience.

- EMC's consulting methodology emphasizes business process re-engineering (BPR), not agile BPM[9].

Fujitsu

This analysis pertains to Fujitsu Interstage BPM 11.0.

Strengths

- Fujitsu's Automated Business Process Discovery (ABPD) services and technologies help clients visually identify critical process paths across established systems. They also help pinpoint where to start with BPM projects, and incrementally optimize existing processes by detecting best-practice patterns.

- Fujitsu's new reorganization is producing more synergies between Fujitsu software and service organizations across regions, and provides a more unified engagement experience for multinational customers.

- Fujitsu Interstage BPM is a multitenant SaaS platform that can be used for private cloud services, or as a platform for external SaaS or cloud offerings.

- Fujitsu Interstage BPM provides solid support for BPM roles across the business process life cycle, as well as a scalable software infrastructure and composition environment for organizations looking to move to SOA and BPM solutions.

Cautions

- Fujitsu Interstage BPM implementations typically have been led by IT professionals; projects initially focus on process integration and later evolve to address continuous process improvement.

- Fujitsu continues to expand its Interstage BPM alliances with larger consultants and system integrators. Customers may find it difficult to obtain Interstage BPM expertise from midtier or boutique consultancies that do smaller, bottom-up BPM projects.

- Brand awareness for Fujitsu as a BPMS supplier is low, especially in North America and Europe; consequently, references are difficult to find.

- Fujitsu may have challenges increasing the number of consultants and partners that are experienced with its ABPD capabilities and can assist in increasing demand for it.

Global 360

This analysis pertains to Global 360 v.10.1.

Strengths

- Global 360's persona-based approach to user experience is strong, and is reflected in many aspects of the BPMS. Multiple viewpoints have been delivered to date. For example, analystView unifies SharePoint and Visio for modeling and analysis. In addition, frameworks and templates for different viewpoints give dramatic productivity boosts for developing user interactions, and result in far less "wiring" of parts.

- Global 360's Microsoft partnership for sales growth is in full swing, delivering significant new business.

- Global 360 offers a strong prebuilt solution for case-management-style processes, as a native .NET solution running on Process360. The vendor's older, Java-based Case360 solution runs independently of Process360 and is still supported.

- Global 360's analystView Visio plug-in for process simulation and optimization is a unique and tremendous approach for advancing simulation skills.

- Integration with and the extension of SharePoint capabilities is very strong. The Global 360 solution seamlessly integrates with and leverages SharePoint to deliver "out of the box" user applications, manager's dashboards, social BPM and collaboration features, and the document repository.

Cautions

- The optimizer capability with analystView is strong, but can only optimize one dimension at a time.

- Global 360 uses configuration models, not explicit process models; and icons are compiled components that get visually configured. The .NET language of your choice is used to extend the out-of-the-box semantics. This approach limits process and instance dynamism.

- The underlying technologies within Global 360's BPMS are not 100% uniform in architecture; some are nonstandard, legacy or unique to Global 360. As a result, customers may find that certain modules provide a less-optimal BPM experience than others. Many areas do not use standard Microsoft technologies. For example, the runtime engine is closed and doesn't use Microsoft Windows WF (although the runtime engine uses an API to orchestrate a Windows WF flow along with its own). Global 360's ongoing plans to unify and continue to advance the technologies require customers to keep up with interim steps to gain the benefits. Furthermore, customers need dedicated system administration and other skills to maintain the environment, rather than relying on their Microsoft infrastructure skills.

- Our research finds only a few customers using Global 360 in the "sweet spot" of Gartner's Four Corners Framework. References did show directional intent to go there, but IT professionals largely maintain Global 360 solutions. Deployed solutions show little flexibility yet.

HandySoft

This analysis pertains to BizFlow BPM Suite version 11.5.

Strengths

- BizFlow handles unstructured and collaborative processes well. For example, this release has features that keep track of dynamically delegated tasks in evolving unstructured processes. This is great for project-driven and command-and-control processes.

- BizFlow is proved with collaborative human workflows in large-scale, complex U.S. federal government installations.

- HandySoft has very attractive pricing.

- HandySoft has a strong partner channel of value-added resellers that delivers various solutions to customers around the world.

Cautions

- HandySoft's commercial base is growing, but its largest sector is still government.

- HandySoft has low brand recognition as a BPMS provider, due to a partner-centric solution delivery model and its industry concentration in government. However, recently, the company is selling directly.

- HandySoft's focus on the BPMS horizontal market has wavered in the past few years; however, 2009 marked a return to a strong focus on this market.

IBM (FileNet)

This analysis pertains to IBM FileNet Business Process Manager version 4.5.1.

Strengths

- IBM FileNet Business Process Manager delivers a mature set of ECM features tied with a growing set of BPM capabilities. This version now incorporates configurable UIs (described by IBM as a role-based business space) to support greater change control over process aspects by business roles.

- IBM FileNet Business Process Manager now emits events – based on the Common Base Event (CBE) specification – that are processed through the Common Event Infrastructure (CEI). WebSphere Business Monitor and FileNet Business Activity Monitor consume these common events.

- IBM FileNet Business Process Manager offers a very broad and deep set of industry solutions through its partner channel. Its new case management solution looks promising.

- IBM FileNet Business Process Manager is well-proven for content-intensive process interaction patterns, in which changes to one content element trigger changes to other pieces of content. (Examples of complex, content-intensive processes include case management processes, bill-of-materials updates or purchase order reconciliations.)

Cautions

- IBM FileNet Business Process Manager is one of IBM's BPMS offerings and is mostly aimed at content-heavy usage scenarios. The majority of our observed implementations have centered on this usage scenario.

- IBM FileNet Business Process Manager is not as intuitive in its ease of development and execution as we have seen from the leading competitors.

- IBM FileNet Business Process Manager has not maintained a level of innovation in its BPM features that we see in other BPMS Leaders and Visionaries. Enhancements are largely relevant for content-heavy usage scenarios.

IBM (Lombardi)

This analysis pertains to IBM WebSphere Lombardi Edition v7.1 (formerly Teamworks 7.1) and IBM BPM Blueprint (formerly Blueprint). IBM purchased Lombardi in January 2010.

Strengths

- Lombardi founders have keen insights into the functions required by all roles – business and IT – that are involved in the business process life cycle. Lombardi consistently produces highly intuitive software that addresses each role's perspective, while providing an integrated round-trip user experience.

- Because IBM WebSphere Lombardi Edition is easy for business analysts to use, it is well-suited to the iterative development of processes, and to continuous process improvement programs in which empowering business roles and business analysts is key.

- IBM Lombardi concentrates on delivering sophisticated change management through its strong repository, which doubles as a process asset management capability. Process governance is a sweet spot for IBM WebSphere Lombardi Edition.

- IBM Lombardi customer references are among the most advanced in BPM maturity. They demonstrate broad adoption of BPM across an organization that yields transformative business results.

- With Blueprint, Lombardi pioneered "BPA for the masses." It provides a low-cost, easy-to-access SaaS tool for high-level process diagramming and knowledge capture that everyone – including casual process participants – can use.

- IBM's market reach and strong brand should accelerate the revenue growth of both products.

Cautions

- IBM is ramping up its consulting capabilities in IBM Lombardi. Beyond training in BPM and Teamworks, few customers have field experience. High sales growth for IBM WebSphere Lombardi Edition is likely to raise customer dissatisfaction with technical and consultative "how to" expertise.

- IBM WebSphere Lombardi Edition's support for case management processes is not as strong as some of its competitors.

- IBM WebSphere Lombardi Edition does not offer multitenant SaaS, which some independent software vendors (ISVs) may need for highly scalable cloud services, or which enterprises may want for private cloud services.

- Integration of Lombardi with the IBM organization and culture will be difficult, and will likely slow Lombardi's rate of innovation to what it was prior to its acquisition. Furthermore, IBM's strategy for technical integration with WebSphere products will require the intense coordination of R&D resources, and will reprioritize Lombardi's envisioned enhancements.

IBM (WDPE)

This analysis is based on IBM WebSphere Dynamic Process Edition (WDPE) v.7.0.

Strengths

- IBM has marshaled all its resources – including Global Services, university outreach, industry expertise and its partner ecosystem – to accelerate user adoption of BPM as a management discipline.

- IBM's Smarter Planet campaign benefits its BPMS by showing how BPM, SOA and cloud computing work better together.

- IBM has started enabling business roles to more directly handle process artifacts and data via a role-based "business space." A business space exposes configurable widgets that enable runtime manipulation of lower-level assets.

- IBM's breadth of BPM assets, including professional services, solution templates, technology components and training, enables buyers to single-source capabilities to create their own BPPs.

- Many IBM customers view WDPE is a "natural" option, since they have already invested in WebSphere Application Server, WebSphere Portal and other products of the family.

Cautions

- IBM offers three distinct BPMS offerings. Its vision for federated interoperability will be difficult for customers to realize.

- IBM is early in its effort to deliver a business-friendly and smooth, integrated business user experience in process development and execution. Translating the business's concept of a process (as represented in WebSphere Business Modeler) into an explicitly managed, executing process solution usually requires significant IT skills and (likely) IBM professional service assistance.

- Although some individual components in the WDPE suite have strong and rich functionality, there are few examples of deployments that leverage the complete suite, including all five components.

- Design and implementation guidelines to meet the requirements of specific customer usage scenarios, including configuration settings across the components, do not exist yet. Consequently, all customers with which we have spoken have required significant professional service assistance.

Intalio

These comments pertain to Intalio/BPMS Enterprise Edition 6.0. Subsequent to our cutoff date, Intalio announced its cloud-based BPM product, Intalio/BPM. Intalio/BPMS Enterprise Edition forms the foundation of the new Intalio/BPM. The new product is meant to address many of the cautions mentioned below.

Strengths

- Intalio continues to be a strong advocate for open standards and open source. This product (and the new Intalio/BPM) incorporates open-source code and open standards, such as BPEL, BPEL4People, BPMN (1.2 in Enterprise Edition and 2.0 natively in Intalio/BPM) and the WS-Human Task life cycle.

- Intalio has always had a unique business model emphasizing low costs for organizations to advance their BPM expertise. Its subscription-based license model (for on-premises and its cloud products) enables buyers to use operating budgets rather than incur capital expenses.

- Intalio has a growing ecosystem of partners (i.e., more than 100 covering 55 countries), thereby making Intalio available in many geographies.

- Enterprise Edition introduced a good layered approach to modeling that essentially reflects a built-in methodology to better match solution details to various perspectives (aka, roles).

Cautions

- Intalio/BPMS, while remaining available as a stand-alone Java application that can be deployed on virtually any application server, has been integrated with Intalio/Cloud and forms the foundation of the new offering, Intalio/BPM.

- Intalio's dependence on OEM and open-source technologies has, over the years, resulted in Intalio replacing core technologies due to technology ownership changes. Enterprise Edition 6.0 has such dependencies (including Ajax General Interface, Eclipse BIRT, Alfresco, JBoss Community Drools, MuleSoft, Apache ServiceMix and WSO2). Many of these dependencies have been eliminated in the new cloud-based offering. For a current list of open-source technologies used in Intalio/BPM, see www.intalio.com/application-engines.

- Out-of-the-box reports in Enterprise Edition 6.0 are few and weak. They are based on Eclipse BIRT (an online analytical processing technology). Out-of-the-box, real-time business activity monitoring (BAM) capabilities are also weak, with little correlation or visualization, although the foundational technologies are good (using event listeners, alarms and triggers).

- The repository in Enterprise Edition 6.0 supports design time only, and is a single-user store. Runtime artifacts must use an external version control system that is reflective of a traditional deployment methodology.

K2

This analysis pertains to K2 blackpearl version 4.5.

Strengths

- The architecture of K2 blackpearl significantly leverages Microsoft standard technologies, including Windows WF, Microsoft Office SharePoint Server (MOSS), Excel Services and Visual Studio, and fills in some of the gaps. For example, this version of blackpearl introduces a new, highly configurable, SharePoint portal-based management console. K2's overall architectural approach is highly valuable from a skill leverage perspective for customers.

- The company's product packaging strategy enables customers to supplement their Microsoft technology and skill investments with a low-cost workflow technology, incrementally advance their BPM maturity, and exploit the full capabilities of blackpearl.

- There is very good integration with Excel Services for rule authoring, editing and applying mathematical functions to data.

- K2's SmartObjects abstract source data from the process, enabling reuse without duplication. Retrieved or referenced source data is transparently surfaced in the process context. This abstraction also enables less technical roles to contribute more to the total implementation.

Cautions

- Blackpearl offers multiple designers with different capabilities for different roles, different contexts and different usage scenarios. Tools range from those meant to address the needs of Visio users, SharePoint users, business analysts and power users, and professional .NET developers. Designers use nonstandard notation and do not use swim lanes. As skills and needs advance, users may have to switch to a different designer to access needed functions. Designers do not yet support process simulation.

- Although there are many improvements in this version of K2 blackpearl since our last evaluation, compared with the other Microsoft-centric tools in this Magic Quadrant, it still supports IT roles better than business roles. Its authoring tools and resulting process solutions are predominantly supported by Microsoft developers (not process analysts and architects), who view K2 blackpearl as a simpler, more-productive approach to exploiting core Microsoft infrastructure technologies. Most usage scenarios are in the lower left and right quadrants of our Four Corners Framework for BPM.

- Blackpearl lacks prebuilt operational metrics and advanced visualization for monitoring processes.

- K2 does not yet offer products or capabilities in blackpearl that support the process discovery phase.

Metastorm

This analysis pertains to Metastorm BPM v.9.

Strengths

- Strong support for the entire life cycle of process improvement, beginning with architectural planning using the Metastorm ProVision Enterprise Architecture and Business Process Analysis models, which move directly into BPMS executable models.

- Ease of use for nontechnical and technical roles is strong. Version 9 has many productivity improvements, including visual scripting, prebuilt UI components and a multilanguage processing engine.

- Metastorm continues to nicely leverage and extend core Microsoft technologies, such as SharePoint, Office 2007 and WF, and is a leading Microsoft Business Process Alliance partner.

- There are many new features and enhancements to existing functionality, including better componentization of stage-action-role (STAR) assets for reuse, improved visualization of process performance, better support for variables, an easy capability for IT to create reusable templates (as a library/extension to Metastorm actions) for business analysts' use and customization, and an impressive new form generator with an automated layout and plug-in architecture for customer extensions.

- A considerable amount of prebuilt process content is available as "process pods" from smaller consulting partners, even in remote geographies (such as Eastern Europe).

Cautions

- Metastorm's v.9 continues using its proprietary modeling notation (based on its STAR metaphor), although BPMN-like constructs, including swim lanes, have been added. Existing customers will need to adjust. Prospects that are used to BPMN may not find it that intuitive.

- Some prospects outside North America report higher-than-expected prices on initial proposals as well as difficulties in negotiating contracts. (This may be the result of prospect comparisons to other low-cost local providers.)

- Version 9 reflects a significant redesign of core architectural components, including the underlying runtime engine. Existing customers will need to use Metastorm-provided migration tools, including new side-by-side server support through a single UI. As of this writing, Gartner has not had any feedback on the ease of migration from users. Similarly, there are few production deployments; thus, we have little user feedback on stability, scalability and other claimed improvements.

- Metastorm's C&SI partners are predominantly smaller firms, rather than large, global firms. Prospects with multinational BPMS projects may discover that their preferred and existing global C&SI partners are unfamiliar with Metastorm.

Newgen Software Technologies

This analysis pertains to OmniFlow version 8.0.1.

Strengths

- Newgen brings strong support for content interactions within the process (due to its heritage in the EDM market).

- OmniFlow is proved for large-volume, document-centric workflows.

- Newgen has a good focus on and an understanding of BPM needs in emerging geographies.

- Newgen consultants are well-trained in the design and architecture of solutions using Newgen's BPMS.

Cautions

- OmniFlow is not proved for "citizen developers." Although it is available and sold as a product on its own, more typically it is installed as part of a process solution that Newgen consultants deliver as part of a professional service engagement. Thus, customers are not consciously choosing a BPMS implementation approach with the intention of business role empowerment and self-sufficiency for maintaining and enhancing a process.

- OmniFlow has weak support for process dynamism. The development environment supports the traditional software development life cycle (SDLC) more than agile, iterative composition paradigms. Thus, OmniFlow is more appropriate for usage scenarios on the left side of Gartner's Four Corners Framework.

- There are few C&SI partners for OmniFlow beyond Newgen's consultants.

Oracle

This analysis pertains to Oracle BPM Suite 11g.

Strengths

- Oracle has delivered an integrated and agile BPMS that will serve well as a process platform for Oracle applications, as well as for BPM efforts, from now on.

- Oracle BPM Suite 11g has the ability to leverage newly integrated capabilities, including complex events, business rules and optimization capabilities. This release rationalizes duplicate functionality that Oracle had as a result of acquisitions and unifies them into an SCA-compliant platform.

- Oracle has delivered the 11g platform in a SaaS model as well.

- Oracle 11g is BPMN-2.0-compliant for organizations that find this important.

- The new SCA editor with the BPM Studio provides a nice architectural perspective on the BPMN implementation model.

Cautions

- Oracle is just starting an effort to create a business-friendly development and execution experience, so it will need work over time. In Gartner's opinion, the UI looks like an Oracle application in execution mode.

- The transition from Oracle BPM Suite 10gR3 to 11g is a major product revision. Customers should be aware that this will involve the migration of some solution assets and is not just a straightforward upgrade. Existing Fuego Software and BEA customers have a multistep migration: They must migrate to 10gR3 first and then wait for new 11g releases to get functionality comparable to what they have today.

- Oracle BPM Suite 11g is the first release of Oracle's new unified architecture. In Gartner's opinion, it is Step 1 on a new product development road map that will bring many more refinements.

Pallas Athena

This analysis pertains to BPM/one version 2, release 1.

Strengths

- BPM/one is highly intuitive for business roles due to its high leverage of visualization and animation technologies.

- BPM/one delivers an intuitive and unique ABPD capability that contributes significantly to process optimization.

- BPM/one delivers strong support for process dynamism in production.

- Pallas Athena delivers a value-based pricing model that appeals to clients.

Cautions

- Pallas Athena's product requires unique development and system administration skills. The modeler is not based on open standards, such as BPMN. The runtime environment, although service-oriented internally, is not based on open Web service protocols. It consists of many components that communicate with each other through programmatic APIs for integration with other infrastructure. The process semantics are not extensible by customers. Such skills will be difficult to source beyond the Netherlands.

- Pallas Athena has few installations beyond the Benelux region.

- There is a lack of skilled resources in the market for BPM/one, including consulting partners.

Pegasystems

This analysis is based on PRPC v.6.1.

Strengths

- Pegasystems' primary strength remains its unified object architecture, which structures all process artifacts, including processes, policies and UIs. This architecture enables Pegasystems to deliver a declarative modeling composition environment that improves the ability of the BPMS to change and adapt to new business needs. The architecture also enables the self-optimization of models by discovering patterns (that perhaps should become new rules) of how work has been handled.

- This release includes many new intuitive visualizations and social networking capabilities to enhance ease of use by participants, aid learning, support cross-role and even customer collaboration, and focus attention on changes in real time (for example, a "pushpin" metaphor, a "what's happening" view, and an interactive process "sticky note").

- This version continues Pegasystems' tradition of business role empowerment, and introduces a completely updated design environment that makes its tools more role-appropriate and expands support for process discovery. Pegasystems uses this new environment to manage its process of solution creation.

- A new browser-based client supports a "BPA for the masses" style of knowledge capture. Skeleton solutions can be modeled and immediately executed as prototypes, with autogeneration of Java and HTML as needed and incomplete steps indicated.

Cautions

- Pegasystems' customers and its BPM expertise are largely in financial services industries (insurance, banking and investments). Since our last evaluation, Pegasystems has expanded into healthcare, too. Its growth as a company will slow unless it begins to diversify geographically and industrywise. Its acquisition of Chordiant Software brings additional telecommunications customers.

- Pegasystems' declarative composition environment represents a paradigm shift for most prospects and will require training to take advantage of it. Customers that do not follow Pegasystems' built-in methodology of iterative development and business role engagement will lose out on some of the benefits that these new approaches can bring.

- Pegasystems' prices are a little high relative to others, reflecting the value it believes it delivers. Pegasystems has a very disciplined approach to sales; its first proposal is typically its final proposal. Buyers should not expect last-minute discounts that they may be accustomed to receiving from other software vendors.

PNMsoft

This analysis is based on Sequence BPM Suite, version 6.

Strengths

- Sequence provides good support for unstructured and highly collaborative processes, including communications-enabled business processes (CEBPs). This product combines some very high-end features with very high ease of use and business user orientation.

- PNMsoft gets marketing and sales support from Microsoft via its Business Process Alliance membership.

- Sequence is highly integrated with Microsoft Office, SharePoint and Outlook.

- PNMsoft is one of the few BPMS vendors to target professional service providers as a market with its change management solution framework.

Cautions

- PNMsoft's geographic presence is primarily in Europe, and it has a beachhead in North America and South America.

- PNMsoft has low brand recognition and buyer awareness.

- PNMsoft has few partners or solution accelerators available.

- PNMsoft is a private, venture-capital-backed participant in this market.

Polymita

This analysis pertains to Polymita Business Suite v.6.0.

Strengths

- Polymita features model-driven development with a strong emphasis on MDM to create a single view of data and processes. This approach enables business users to make changes to processes and master data on running processes.

- Polymita consistently delivers nice innovations. Its version 6 delivers many new capabilities, including a BPMN, a Web-based modeler, a cloud-based PaaS package, and a new tool (FreeFlow) to manage unstructured processes and discover process patterns.

- Polymita supports unstructured and structured processes interactively in a natural way, leveraging self-adjusting processes based on personalization and behavioral patterns.

- Among the Java-based offerings, Polymita delivers one of the strongest approaches to case management as a BPMS usage scenario.

Cautions

- As a small private vendor, and in a tough global economy, Polymita will be significantly challenged to deliver on its international growth plans and gain global market share.

- Polymita has a smaller installed base than others in this analysis. Its references are predominantly in Spanish and Latin American organizations. Polymita has recently established beachheads in the U.K., the Netherlands, Germany, China and the U.S.

- Some customers have reported that they need to do more custom coding than they expected, based on their proofs of concept and product evaluations. Although things seem easy initially, more complex interaction patterns require more custom coding to extend the out-of-the-box functionality.

Progress (Savvion)

This analysis reflects Savvion BusinessManager 7.5 SP1.

Strengths

- It has an open, clean, well-documented architecture that is proved for enterprise-class large process solutions with high scalability. The architecture makes it easy to integrate with software infrastructures and application development tools, and partners can embed it easily.

- It has support for all resource interaction patterns found in enterprise-class, human-centric, system-centric, document-centric, event-centric, decision-centric, case management and project-oriented processes.

- Visualization of many process aspects is innovative and easy for business professionals to use. Examples include its modeler, design time repository, dashboards and reports, and graphic analysis of process execution paths.

- Progress Savvion Business Expert supports real-time analysis of in-flight processes, and dynamically suggests changes to process conditions and rules to keep running processes optimal, leveraging its improved rule engine. It has strong reporting capabilities. Users can dynamically add new process performance metrics in the runtime environment to gain insight into current execution data.

- Savvion's acquisition by Progress Software brings much-needed support to expand partnerships and global reach, and to accelerate sales – in addition, it brings Progress technological strengths in complex-event processing (CEP), integration and BAM capabilities that can be leveraged. Progress has framed Savvion together with Apama into a value proposition dubbed "Responsive Process Management Suite," which is a differentiator.

Cautions

- The overall user experience of BusinessManager is not as model-oriented as other pure-play products. Particularly in enterprise solution projects, users report the need to exploit APIs in the architecture to achieve desired results.

- Gartner expects prices to rise, and flexibility in contractual terms and conditions to decline, due to Savvion's transition from a private company to a public one.

- Progress is continuing Savvion's support for every segment of the BPMS market, including resellers, C&SI partners, ISVs and end users. This is hard to do for a company the size of Progress, and will bring Progress in even more direct competition with vendors – such as Oracle, IBM, Tibco and Software AG – which are two to five times the size of Progress.

SAP

This analysis pertains to SAP NetWeaver BPM and SAP NetWeaver Business Rules Management (BRM), which are part of SAP's NetWeaver Composition Environment (CE) 7.2.

Strengths

- Excellent integration with SAP's Enterprise Services Repository makes it easy to exploit services and create before, after, and in-between workflows.

- NetWeaver BPM enables process experts to work directly with business leaders to extend SAP applications with explicit workflows that cross SAP and non-SAP applications.

- Scenario models provide high-level, contextual business views to complement BPMN process flow models.

- Integration with NetWeaver CE provides one environment to support the new, composition-driven life cycle (including the process layer, UI layer, service layer and rules). This setup supports collaboration across business and IT developers throughout the life cycle.

- As with other NetWeaver components, the bigger the customer's commitment to SAP, the more attractive this tool will be. It will always work better with SAP assets than non-SAP assets.

Cautions

- Some of NetWeaver BPM's features are weak compared with most products in this Magic Quadrant, such as real-time BAM, group interaction pattern support, business and IT role collaboration, automated UI generation, and content integration beyond attachments. However, its integration with SAP NetWeaver BRM is stronger than the rule capabilities of many other vendors.

- NetWeaver BPM process participants that access SAP applications and data need to be licensed for those applications.

- NetWeaver BPM has its own repository for process artifacts, which is different from other SAP metadata repositories. Thus, process metadata is not yet integrated with other SAP metadata. Governance over SAP's SOA and process artifacts is weak.

- SAP's ambitious vision for a unified view of process metadata across SAP applications, NetWeaver BPM processes, and NetWeaver Process Integration (PI) integrations (described by SAP as "process orchestration") will not be realized before 2012[10].

Singularity

This analysis pertains to Singularity Process Platform (SPP) v.4.3.

Strengths

- A reinvigorated vision, mission and some key leadership roles have been driving product innovations, a new LiveAgility SaaS offering, new partnerships and greater regional market success in the past 12 months.

- The product has many unique features to drive business role involvement and business and IT collaboration throughout the life cycle, and also to support knowledge-intensive, unstructured process designs (such as case-management-style processes).

- Singularity is an extremely well-managed, self-funded, private company with strong financials, no debt, and a strong customer and community focus.

- Singularity is one of a handful of BPMS vendors with a top-notch Agile BPM methodology (called ASAP) that is fully integrated with its products.

- The LiveAgility front end is more intuitive than Singularity's traditional client technology in SPP.

Cautions

- Despite its regional successes, Singularity has struggled to expand into the U.S.

- Built-in rule capability is average.

- LiveAgility offers a slim version of the SPP client functionality, and uses a consumerized interface (based on Silverlight). This difference may confuse participants as they move from cloud-based processes to in-house processes.

- SPP lacks advanced visualization and process discovery support.

Software AG

This analysis pertains to Software AG's webMethods 8.

Strengths

- Buyers can potentially source their BPMS, enterprise service bus and SOA registry/repository from one vendor, with confidence that the BPMS is well-integrated with market-leading SOA technologies.

- Software AG is a strong, public company with a growing portfolio of products and professional services to support customer BPM programs, not just projects. Its acquisition of IDS Scheer in 2009 added breadth and depth to its product portfolio, professional service strength and process domain knowledge.

- A new license agreement with FICO gives webMethods users unrestricted use of an embedded Blaze Advisor rule engine.

- Version 8 builds on an already-proven base of technologies. WebMethods Optimize and its new CEP product bolster Software AG's BAM and event-processing capabilities.

Cautions

- Version 8 was released in December 2009, so there are few production-level deployments yet.

- The authoring environment for process modeling, rule authoring and UI design is based on Eclipse, and, therefore, is most appropriate for IT professionals. Compared with other BPMS products, the environment and these tools are not as business-role-friendly (although Web-based tools are used to edit and maintain them during deployment).

- References using webMethods BPMS in a fashion that is consistent with Gartner's BPMS usage scenarios are not readily available. Software AG does not have a mature customer reference program.

- UI design remains a technical responsibility, due to the Eclipse-based designer, rather than enabling business analysts to collaborate with business roles to create UIs, as is common in other BPMSs. (By collaborating and prototyping UIs with business users, the development time can be significantly reduced.)

Tibco Software

This analysis pertains to Tibco iProcess Suite v.11, because the new ActiveMatrix was not generally available by our cutoff date of 31 March 2010 to be included in this rating.

Strengths

- Tibco iProcess Suite uses an event-driven architecture that leverages RFID where appropriate, with a strong, wizard-driven and highly visual BAM layer to enable deep process insight. Process optimization is a sweet spot for Tibco.

- There is good support for many open standards, including XSLT, XPDL, BPEL and BPMN. Artifacts are saved in XPDL, and enable easier translation from BPMN to runtime BPEL, as well as interoperability with other BPM tools, such as IDS Scheer.

- Tibco has leveraged the composite processes and services well in its customer base, and has advanced processes leveraging dynamic event processing in production at client sites.

- Tibco has a strong vision of "Dynamic BPM" as products move forward with strong cloud offerings.

Cautions

- A sophisticated product and high price prevent Tibco from appealing to less-mature buyers and smaller organizations.

- There is little support for complex content interactions. Case-management-style unstructured processes are not naturally supported.

- Although new versions of iProcess are being planned, they are mostly aimed at fixes and simplifications. There is a partial migration path from the iProcess product line to ActiveMatrix BPM.

- Poor sales performance of iProcess compared with competitors (especially in the U.S.), and the market's growth overall, contributed to Tibco's lowered position this year on the execution axis.

Acronym Key and Glossary Terms

BAM	business activity monitoring
BPA	business process analysis
BPM	business process management
BPMN	Business Process Modeling Notation
BPMS	business process management suite
BPP	business process platform
ECM	enterprise content management
ISV	independent software vendor
MDM	master data management
RIA	rich Internet application
SaaS	software as a service
SOA	service-oriented architecture
UI	user interface

Evidence

[1]For a detailed description of the Gartner Magic Quadrant methodology, see "Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market."

[2]For more information on Gartner's proprietary methodologies, see www.gartner.com/technology/research/methodologies/methodology.jsp.

[3]In developing this Magic Quadrant, we reached out to more than 80 specific reference accounts for the vendors positioned in this research. These references were provided by the vendors, or we solicited input based on our own reference base. We also conducted product demonstrations with every vendor positioned on this Magic Quadrant.

[4]The authors of this Magic Quadrant have conducted more than 1,500 inquiries in the BPM space (1:1 discussions – usually 30 minutes in length – with clients, vendors and prospects) since the publication of the 2009 "Magic Quadrant for Business Process Management Suites."

[5]These findings come from a September 2010 Gartner user adoption survey, which was completed by 593 respondents culled from a random sample. Responses were equally divided from among North America, Western Europe and the Asia/Pacific region. An equal number of business roles and IT roles responded in each region. All responses were from companies with more than $250 million in annual revenue. Respondents were from end-user organizations. Technology vendors and IT service providers were excluded.

[6]"People, Processes and Information: United at Last in BPM"

[7]"Two Factors That Help Identify the BPMS 'Sweet Spot'"

[8]"Hype Cycle for Business Process Management, 2010"

[9]"The BPM Consulting and System Integration Capabilities of the Top BPMS Vendors"

[10]"SAP Influencer Summit 09: Assessing SAP's Strategy, Issues and Opportunities"

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.