

Magic Quadrant for Business Process Analysis Tools

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Business process analysis tools continue to grow in importance as business managers, process architects and process analysts seek to better understand, streamline and automate their business processes and communicate their needs to IT professionals.

WHAT YOU NEED TO KNOW

Business process analysis (BPA) tools are intended primarily for use by business architects and business process (BP) architects, who are responsible for redesigning BPs at a conceptual level, and BP analysts, who redesign processes at a more detailed level and are responsible for coordinating the implementation of the new processes as part of BPM projects, IT development projects and package purchase acquisitions (see "Role Definition and Organizational Structure: Business Process Improvement"). Although these two roles are being staffed increasingly in end-user business units, in many organizations, IT architects and analysts more commonly fill these roles.

BPA tools also can be used by other roles in the organization — for example, business users and data, enterprise and technical architects looking to understand BPs in the context of their disciplines. The BPA tool market sits in between the enterprise architecture tool market and the BP management suite (BPMS) tool market; not surprisingly, many BPA tools are sold into these markets for modelers with these focus areas. For example, the BPA tool selection teams from some organizations want a tool with more of an architectural focus, including support for models related to organizational, stakeholder and strategy issues. Still other BPA tool selection teams focus on solutions that support the integration of BP models with process assembly, and workflow orchestration and optimization technologies. While others focus on selecting BPA tools that support the integration of business processes and IT modeling tools to facilitate application development and package purchase, BPA tools can support a wide spectrum of organizational roles that have differing degrees of business and technical modeling expertise; these tools are at the nexus of most collaborative modeling efforts in the enterprise.

More specifically, BPA tools enable BP architects to document, analyze and streamline complex processes, enabling business areas to become more agile and effective when used with the appropriate method or approach. BP analysts, in turn, redesign BP models and refine them to a more detailed level to ensure that the processes are communicated properly to those who are implementing them through development, package purchases or applications hosted by partners or third parties. IT organizations are increasingly seeking to better understand how BPs relate to and are designed and implemented in service-oriented architectures (SOAs). This requires changes to architecture, analysis and design methods, policies and practices to create good business, software and data services that are cost-effective and enable the future direction of the enterprise.

Organizations also are showing increased interest in having better integration across roles through the use of integrated or best-of-breed suites of tools that support modeling for BP, object-oriented and data/database analyses and design, and requirements management. For example, as a best practice, organizations are defining BPs, events and workflows in BPA tools and are bridging this information into IT modeling tools and BPMSs where more-detailed software and data service analyses, design and development occurs.

BPA tools are key components of BP improvement initiatives and the discipline of BP management (BPM). BPA tools are used by business analysts and architects to construct BP models. Process modeling is a key BPM technology when used in a BPMS. In this capacity, BPA tools complement BPMS tools by enabling deeper, multilevel modeling (conceptual, logical and physical in greater detail and relationship mapping) than the modeling component of a BPMS. When used in conjunction with a BPMS, the BPA tool can be an integrated component of a single-vendor BPMS, or it can be a best-of-breed BPA tool that bridges into a best-of-breed BPMS. Because the functionality of best-of-breed BPA tools and BPMS modeling tools overlap so much, both types of products are included in this Magic Quadrant and must be evaluated in the context of a BPA use scenario as described in this research. Beyond the scope of this Magic

Quadrant are the issues related to the degree of integration among tools in a BPMS and how they share not only models but all types of metadata (see "Evaluating BPMS Metadata Management Capabilities").

BPA is also becoming a starting point for BPM projects and compliance activities. Linkage to the workflow assembly and orchestration engines and business activity monitoring (BAM) tools is driving BPA into the mainstream for BP improvement initiatives. Understanding complex BPs is a significant challenge. The assistance of a tool with visualization and other features — such as simulation and activity-based costing (ABC) — helps optimize BPs and realize BPM cost and time savings. BPA tools help define the business architecture portion of the enterprise architecture. Many BPA tools can be used by technical, application and data architects to define the technical and information architectures. Because most BPA tools have a shared repository for these models, it is possible to do change impact analyses across organizations and roles based on the interrelationships of their models. Still, BPA tools focus primarily on the business architect, BP architect and analyst roles.

Although most BPA tools are purchased to do BP improvement from a top-down perspective (that is, with architecture and analysis preceding projects that implement specific BPs as workflows), many customers first implement a BPM tool for the orchestration of processes as workflows (that is, to improve a human-to-human process), then add a BPA tool to better understand their processes at a more abstracted level of detail. BPA tools enable architects and analysts to diagram their processes using rules or specifications to promote understanding and to validate this information using standard methodologies and best practices enabled by the software. Ideally, organizations use the knowledge captured in these BPA tools to automate the models into deployable applications that leverage the analytical efforts and ensure compliance of the execution environment with BP rules. Generally, this is accomplished via bridges from the BPA tools to other BPM or IT development technologies. When round-trip changes are needed between BPA and BPM models, buyers typically focus on a more tightly integrated BPMS solution, normally from a single vendor.

What has been the growth rate for the BPA tool market during the past three to four years?

Based on Gartner estimates, the market revenue has grown consistently an average of 10% to 15% during the past several years. Gartner BPA market estimates for new-product license and maintenance revenue in 2006 was \$404 million, and this grew to an estimated \$415 million in 2007 (around 10% growth). When sizing the 2006 BPA tool market, we included 5% of the BPMS tool market (\$45 million) to account for the BPM tool modeling capabilities being used for BPA. For 2007, we elected to count revenue only from BPMS vendors for BPA tools sold separately. In other words, the \$415 million represents best-of-breed BPA tools, even if some vendors have other process modeling tool revenue as part of their BPMS. So, in 2007, we excluded some of the BPMS modeling tool revenue we counted in 2006 as part of the BPA tool market. Therefore, the BPA tool market arguably grew at closer to a 15% rate over the past year.

A large follow-on market also exists for consulting and services in implementing these tools and the methods to use them. When calculating the BPA market revenue, we did not include consulting or service revenue. For many vendors, this add-on consulting and service revenue significantly exceeds software revenue. Also, BPA tool vendors increasingly are adding complementary software products in the areas of governance, risk and compliance (GRC), as well as more-purchasable content in terms of prebuilt models delivered in their BPA tools.

What is the projected growth rate for the BPA tool market during the next few years?

Expanding the demand for BPA tools should result in at least a 10% compound annual growth rate in market revenue through 2010. We expect that the number of BPA users will grow at significantly faster rates than BPA market revenue. This will create greater opportunities for

selling increased BPA consulting services and open up more cross-product marketing to vendors with multiple tool offerings as part of their BPMSs.

Do you expect the BPA market to disappear at some point because of vendor consolidations and the emergence of BPMSs? If so, then when do you expect this to happen?

We do not see the BPA market disappearing, even in the long term (that is, through at least 2012) — although market consolidation of vendors already has begun (for example, the acquisition of Proforma by Metastorm and Telelogic by IBM). The stability of BPA tool vendors is not based only on product sales. Most BPA vendors have a complementary set of consulting service offerings in such areas as BP methods and disciplines that can generate revenue at five times the BPA tool revenue rate; therefore, the stability of the BPA tool market — including smaller specialty/niche BPA vendors — is greater than may appear at first glance.

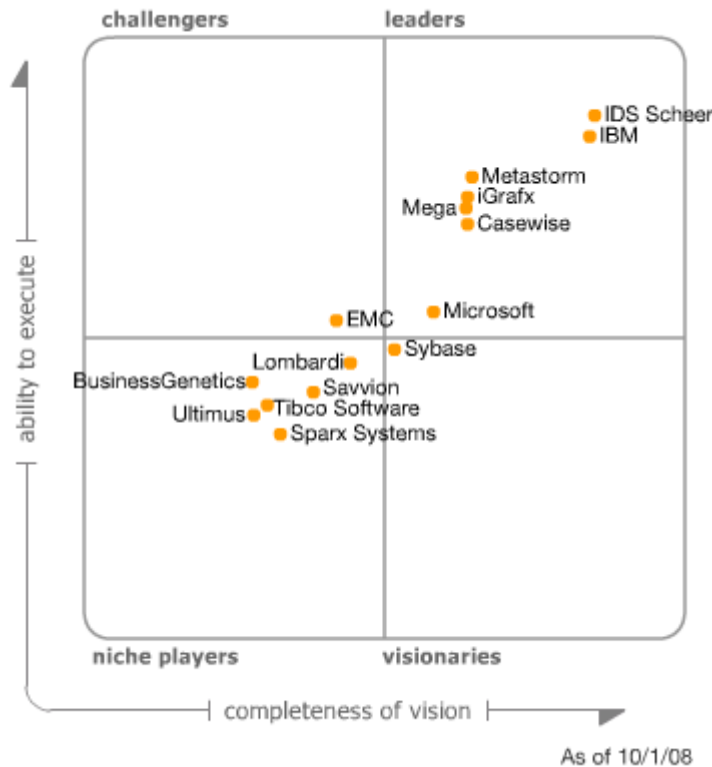
The BPA tool market will continue to attract new players, especially BPM/BPMS vendors extending their tools to provide greater BPA capabilities, and other vendors, such as those in the object-oriented analysis and design and data modeling/database design markets extending their tools to support BPA. Because BPMSs include BPA technology as a key component, many organizations will implement an integrated single-vendor solution from their strategic partners during the long term. Currently, however, the BPA tool market leadership is dominated by best-of-breed technologies. Therefore, opportunities will continue for specialty — generally niche — BPA vendors to flourish (see the vendors listed in the Honorable Mention section). For more on the evolutionary path of the BPMS market, see "Four Paths Characterize BPMS Market Evolution."

Another interesting and related dynamic is that the enterprise architecture tool market is extending increasingly down into the level of solution architecture, beyond the future enterprise technology architecture and into enterprise data, application and (especially) business architectures. Therefore, many leading BPA tool vendors, especially those that also have enterprise architecture tool offerings, can be expected to grow their BPA business "up" into the level of solution architecture as part of broader modeling suites. For more on this topic, see "Trends in Collaborative Modeling."

At the same time, we expect consolidation in an overcrowded market. Many small players, especially those coming late to the market or failing to address alliance partnerships and distribution channels, will be bought, fall to niche status or slowly disappear. However, the overall BPA tool adoption rate will accelerate as mainstream organizations become more involved with BP modeling to support SOAs and address compliance issues with models based on government mandates and buy and implement the next generation of model-driven application packages based on BP models and prebuilt service-oriented software and content. For more information, see "Model-Driven Packaged Applications: Using SOA and BPM to Modernize Packaged Applications."

MAGIC QUADRANT

Figure 1. Magic Quadrant for Business Process Analysis Tools



Source: Gartner (September 2008)

Market Overview

As with the 2007 BPA tool Magic Quadrant, we continue in 2008 to focus on BP architects and analysts as the prototypical buyers of BPA tools. In 2007, we identified three major areas of focus by BPA tool buyers, which we called "architects," "BPMS modelers" and "BP modelers." Architects required robust solutions aligned with enterprise architecture, BPMS modelers focused on BP modeling as part of BPMS process composition projects and BP modelers focused on BP improvement projects, regardless of whether there would be a BPMS implementation (that is, to identify BP improvement opportunities that might involve some or all of application package purchases, application development, or enhancement or process composition).

In 2008, buyer focus has become more complex (see "Consider Eight Areas of Focus When Selecting a Business Process Analysis Tool"). Although we still weight the selection criteria for this BPA tool Magic Quadrant in favor of vendors with tools whose footprint best supports business architects, BP architects and BP analysts, we recognize that BPA tool purchases may be intended to solve the needs of a more diverse user base. These areas of buyer focus are not intended to be descriptions of job positions; they merely reflect how organizations prioritize who will use the BPA tools and, by extension, how the tools will be used. That is, if enterprise business architects are the prime target users of the tools, then their methods and the functions and features they need will be different from other users of the BPA tool, such as BP analysts

working on BP automation projects using a BPMS. BPA tools can support a wide spectrum of roles that have varying degrees of business and technical expertise. Certain tools meet specific needs better than others, so it is important to prioritize who will use the tool and to understand the methods and functional requirements of tool use to choose the most appropriate product during the selection process.

Organizations should not consider vendor placement in this BPA tools Magic Quadrant as automatically reflecting which tools will best match their organizational needs. In some cases, a niche player or a tool mentioned in the Honorable Mention section of this research may be the best fit.

In the companion research "Understanding Vendor Placement in the BPA Tools Magic Quadrant," we explore the issue of which vendors and products best meet users' differing needs and how BPA solutions are compared and contrasted with one another.

Honorable Mention

A number of interesting alternative vendors didn't make the cut for the BPA Magic Quadrant appear in this section. In some cases, these vendors did not make the cut because they did not reach the minimum revenue required for inclusion (generally due to their newness). Other vendors offer interesting complementary tools. We deemed the following technologies as worthy of honorable mention:

- **Embarcadero EA/Studio:** Embarcadero Technologies has a leading data modeling/database design tool, EA/Studio. The release of a BPA tool, EA/Studio, on 15 March 2007, completed Embarcadero's modeling suite, providing BP modelers with a low-cost companion tool that supports the Business Process Modeling Notation (BPMN) standard. The initial release of EA/Studio focuses on ease of use. EA/Studio is compliant with the Eclipse open-source standard and, therefore, can "plug and play" with any other Eclipse-compliant tool. It lacks some of the more-robust capabilities of the BPA tool market leaders; however, for many organizations, it's a good alternative to Microsoft's Visio — especially for EA/Studio customers looking to integrate and leverage models and requirements across business and data analyst roles. EA/Studio comes in two editions. EA/Studio Community Edition (CE) can be downloaded for free at [Embarcadero EA/Studio CE](#). As with most free software, it comes with no help desk support. However, users can download updates to CE for free, as they become available. EA/Studio Business Modeler Edition (BME) has more-advanced support for the BPMN standard and supports conceptual modeling for top-down database design. BME sells for an average seat price of approximately \$1,000, which includes help desk and maintenance support. BME comes with a bidirectional bridge with EA/Studio, and CE and BME both have a bridge from Microsoft Visio.
- **Global Enterprise Managers' GEMWorX FlowModeler:** Global Enterprise Managers' GEMWorX FlowModeler extends Visio's modeling capabilities (that is, it merely "pops up" in the Visio user interface environment in a transparent way to modelers) with more support for business modelers. Visio users will find that, in FlowModeler, their diagrams can be organized hierarchically, linked to each other (and to process-related resources), Web-published and navigated in a browser. Subsequent process design brings GEMWorX's data-driven functionality into play, including a lightweight learning management system that enables FlowModeler/Visio diagrams to be transformed into business reference and e-learning assets. FlowModeler is part of the GEMWorX Suite of integrated BP analysis and e-learning tools. It is repository-based, includes support for versioning and team sharing of model information (that is, integration with Microsoft Office SharePoint Server) and simulation (with animation) for ABC. FlowModeler also

allows user-defined process shapes with custom attributes, includes preformatted reports, readily enables users to query the data repository and provides flexible search capabilities (via Workflow Explorer) that support the maintenance and updating of process diagrams. GEMWorX is focused on human-driven processes, so it emphasizes simplicity and clarity for the (Visio) modeler and the (Web-based) end user. Although Global Enterprise Managers is a small, emerging company, the potential value of GEMWorX can be high. Organizations that must produce end-user learning materials in coordination with model-based new development, package acquisition and BP improvement projects — including by large external service providers (consulting) and ERP (application package) vendors — will find GEMWorX worth considering, as will those expecting high levels of personnel turnover requiring training of new employees. Stand-alone, single-user FlowModeler is \$295. However, most purchases of FlowModeler generally are made as part of a GEMWorX Suite acquisition. A typical GEMWorX Suite implementation includes 10 FlowModeler seats and 20 concurrent eUser logins in the price range of from \$16,000 for an annual subscription to \$36,000 for a perpetual license. Additional FlowModeler users are \$700 per seat, and blocks of concurrent eUser logins are nominally priced.

- **Nimbus' Control 2007:** Nimbus' Control 2007 provides a unique approach for involving the whole workforce in process modeling, letting them define, sustain and consume content in a personalized collaborative portal or via Microsoft SharePoint. The result is an electronic operations manual that is always up-to-date, describes how the business operates, and transcends manual and automated processes. The focus on end-user adoption and management of an auditable change cycle of the content distinguishes Control 2007 from other BPA tools. Control 2007 delivers role-based storyboards (personalized guided process walk-throughs similar to e-learning) through Microsoft SharePoint and, in the planned next release, to Windows Mobile devices, with an iTunes-style interface using Microsoft Silverlight. Control 2007 links process diagrams to actual systems and captures process performance data to populate metrics so that the resulting model not only documents how the business operates, but also shows how it is performing. Control 2007 is integrated with leading BPMs. Customers can also import, manage and publish content from other BPA tools, such as IDS Scheer's ARIS, the iGrafx Suite, Microsoft's Visio, and those that support BPM-X from BPM-Xchange. Control 2007 is integrated with SAP's Solution Manager repository. Organizations can use Control 2007's GRC capabilities to drive compliance initiatives from a process perspective. Control 2007 cost per seat runs from \$150 for role-based viewer/consumers of content to \$4,500 for authors/modelers responsible for the content.
- **Orbus Software's iServer:** Orbus Software was founded in 2004. It markets a repository-based modeling tool, iServer, which uses Microsoft Visio as its primary user interface. The shapes on each diagram become repository objects (artifacts and building blocks), and iServer manages the relationships among those objects. iServer has many capabilities similar to other popular repository-based BPA tools, such as those from Casewise and ARIS, but with the advantage of being less expensive and easier to use. iServer comes with a companion product, Publisher, which provides browser access to the repository. A project use of iServer may cost \$30,000 to \$40,000, and an enterprisewide sale that includes Publisher may be in the range of \$140,000 (150 iServer users and unlimited browser users) to \$260,000 (500 iServer users and unlimited browser users). Orbus Software is a recommended partner of Microsoft when there is a focus on Visio modeling using the BPMN standard. One key distinguishing feature between iServer and other BPA tools is iServer's depth of Microsoft Office integration, for example, the traceability to and interrogation of individual components in Microsoft Word documents (such as key performance indicators [KPIs], requirements,

work instructions and risk profiles). Orbus's data exchange product contains an Excel import/export interface for editing metadata and relationships offline. Although iServer competes head-on with other BPA tools, it also can be used in a complementary manner, with bridges between iServer and Casewise, IBM Telelogic System Architect and IDS Scheer ARIS. iServer also interfaces with Microsoft SharePoint for document synchronization, ProModel Process Simulator for process simulation and K2's blackpearl for workflow and process automation. iServer provides several frameworks and methods with iServer, including those for the Zachman Framework for Enterprise Architecture, The Open Group Architecture Framework (TOGAF) and the Information Technology Infrastructure Library (ITIL). iServer also comes with strong technical features, such as being able to "baseline" and compare different structures, models and documents across views, timelines and scenarios, as well as being able to set deadlines for document "packages" for given release dates and sets. To be included in the 2009 Magic Quadrant, Orbus Software must grow its revenue significantly. However, the number of Visio users is substantial, and there is significant room for Orbus to grow the business with a well-executed marketing plan targeting them.

- **Visible Systems' Visible Analyst:** Visible Systems is best-known for its Visible Analyst and Visible Developer products. The former supports data and object-oriented analysis and design modeling and database schema generation for any dialect of Structured Query Language and BP re-engineering (Visible Analyst's flexibility enables top-down and bottom-up development). The latter focuses on developers wanting some object-oriented (Unified Modeling Language [UML]) modeling with Java, C#, ASP.NET and VB.NET code generation. Visible Systems extended the modeling capabilities of Visible Analyst in June 2007 to include support for BP (BPMN) modeling by enterprise architects, business architects and BP architects and analysts. Gartner estimates that Visible Analyst's sales revenue for those doing BPA modeling was less than \$1 million in 2007; however, approximately 15% of new product sales were for BPA use, which indicates the level of interest in going beyond the application and data modeling capabilities in Visible Analyst to also support business architecture. Historically, Visible Systems has sold lots of copies of Visible Analyst and Visible Developer into its customer accounts. With prices at approximately \$2,500 a seat, \$25,000 for a project and \$100,000 for an enterprisewide sale, it compares favorably on price against vendors such as IBM and Mega, which have a similar breadth of modeling suite. Visible also is known for having good technology. It comes with an integrated modeling environment, including a multiuser repository supporting integrated process, data and object modeling. It contains a rule engine for completeness and consistency across projects, as well as the ability to link planning statements with the underlying IT architecture. It has a flexible methodology and modeling framework, including support for Zachman and The Department of Defense Architecture Framework (DoDAF). In the first version of Visible Analyst to support BPMN, there was a greater focus on process architecture; as a result, there are currently no bridges into BPM tools. However, Visible Systems plans to release Business Process Execution Language (BPEL) generation capabilities later in 2008. With more than 100,000 maintenance licenses for Visible Analyst and Visible Developer, there is a natural base of customers to grow add-on BPA tool sales. Visible Systems plans to extend Visible Analyst's support for business architects and analysts in a similar evolutionary manner as the approach taken by Sybase to grow its sales of PowerDesigner beyond use by data architects and analysts to include business architects and analysts. With the right alliance of partnerships and distribution channels, Visible Systems could grow its revenue to meet the inclusion criteria for the Magic Quadrant during the next two years. Regardless, organizations looking to support all types of IT and business modelers in one tool with an integrated repository at a relatively

low market cost that also is integrated with application development technology should consider Visible Systems as a technology provider.

Market Definition/Description

Gartner defines BPA as the business modeling space in which business professionals (that is, business users, business architects and BP analysts) and IT analysts collaborate on business architecture, transformation and improvement, including process analysis and design to support BP improvement initiatives. Business architects use BPA tools to work collaboratively with enterprise, technical, application and information architects as part of the organization's solution architecture efforts. This ensures that the processes conform to the requirements, principles and models that support the enterprise's change agenda — as captured in the gap plan and transition road map. BPA tools also are used by BP analysts and designers to capture the details of the BP, ensuring that process flow improves the quality of the requirement assessment for custom development, as well as that of as-is and to-be gap analyses in packaged implementations. Furthermore, BPA can serve as a bridge to improve the alignment of IT efforts with business initiatives. Process modeling as part of BPA is becoming a starting point for a growing number of BPM and compliance projects. Conversely, most BPM projects start with tools that include process modeling in support of workflow and add a BPA tool to better understand their processes and simulate possible changes. Most BPA tools include BAM capabilities or partner with BAM tool vendors, including executive dashboarding into BPs.

Most BPA tools can be used for BP and workflow design and implementation in conjunction with best-of-breed BPM workflow and orchestration tools as part of a BPMS, or with the BPA tool vendor's BPM product as a single-vendor BPMS. Most BPMS vendors have a process analysis, design and workflow modeling tool. Some vendors compete in the BPA market (or plan to do so), while others use the leading BPA tools as complementary business architecture modeling tools to front end their project-oriented process and workflow design modeling tool. We did not address these latter process and workflow design modeling tools as part of the BPA market; Gartner considers the BPMS market separately (see "Magic Quadrant for Business Process Management Suites, 2007"). Similarly, many BPA tools can be used by enterprise architects as part of the enterprise architecture tool market (see "Magic Quadrant for Enterprise Architecture Tools"), and these tools also were not considered as part of the BPA market. However, BPA models that are developed by business architects and analysts are expected to be leveraged in collaboration with other modelers in the organization, including enterprise architects, technical architects, information architects, application architects, and IT and BP and workflow designers. Therefore, BPA tool vendors that provide complementary capabilities in these areas receive some additional credit in the BPA market Magic Quadrant for having a wider breadth of solution.

Inclusion and Exclusion Criteria

We have chosen to include vendors meeting one or more of the following criteria in the BPA tool market:

- A total of 3% (\$12.5 million) or more in new product and maintenance license revenue in 2007
- Greater or equal frequency of appearance in inquiries by Gartner customers, as compared with competitors listed in the Magic Quadrant
- Greater or equal frequency of appearance on Gartner customer evaluation shortlists, as compared with competitors listed in the Magic Quadrant

- BPA tools that do not meet the aforementioned criteria but have some niche or specialty characteristic that could be of interest to Gartner clients (for example, a lightweight or good-enough BPA tool that is sold as part of a suite by a leading BPM vendor)

We used these inclusion and exclusion criteria for the 2007 Magic Quadrant.

Added

- BusinessGenetics, Lombardi, Metastorm (acquired Proforma, which appeared in the 2007 BPA Magic Quadrant) and Sparx Systems

Dropped

- Telelogic was acquired by IBM, including its System Architect BPA tool.
- Proforma was acquired by Metastorm, including its ProVision BPA tool.

Evaluation Criteria

Ability to Execute

We selected the same three major criteria and weightings as in 2008 to evaluate the ability of the vendor to execute in the BPA tool market. Other criteria not selected explicitly were factored into the three that were selected (for example, sales and marketing execution and operations were subsumed as part of overall viability). First, we identified customer experience as the highest-rated evaluation criterion. We evaluated the vendors' and products' ability to enable the success of BP architects and analysts in their jobs versus their competitors. Second, we rated highly product breadth and depth of functions and features, because many organizations want the most robust, best and most innovative technology. The technology with the best functions and features does not always make process architects and analysts the most successful. Third, we rated as slightly less important the overall (current) viability of the vendor and tool in the BPA market (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	no rating
Market Responsiveness and Track Record	no rating
Marketing Execution	no rating
Customer Experience	high
Operations	no rating

Source: Gartner (September 2008)

Completeness of Vision

We used the same criteria and weightings for completeness of vision as we did in 2008. During the next five years, as the acquisition of BPA tools grows by mainstream and generally more risk-averse organizations, vendor viability will become an increasing concern to buyers. Therefore, we rated business model vision as the most important aspect of the completeness of vision criterion.

For rating purposes, we included in the business model vision rating related criteria, such as market understanding, market strategy, sales strategy and geographic strategy. We rated offering (product) strategy highly, not so much because of shortcomings in the leading tools, but rather because we see opportunities to use improving functions and features, such as BAM and business rules, during analysis and design activities, as well as new diagram types, as standards continue to emerge — to further leverage the work of process architects and analysts. We included innovation in the rating for offering (product) strategy. Finally, we included vertical/industry strategy as a lesser-weighted criterion — but one that we see growing in importance as less-sophisticated (more mainstream) BP architects and analysts seek to jump-start their modeling efforts, buy models to save time, acquire "straw man" examples of best-practice BPs from leading third parties and better understand purchased applications.

More on Functionality Criteria

In "Selection Criteria for BPA Tools, 2H08-1H09," we examined the following types BPA tool functionality:

- Business model drawing/development
- Ease of use in operation/development and administration
- Integration and automation
- Multiuser support/versioning and extensibility
- Business model drawing/development
- Methodology and use
- Performance and scalability
- Vertical industry and horizontal cross-industry template support

Some key function/feature differences we used to rate tool functionality in this Magic Quadrant include the ability to support process simulation, ABC, BAM, industry standards and frameworks, bridges from/to other leading BPMS and IT tools, and prebuilt/prepopulated models and content.

We used these inclusion and exclusion criteria for the 2007 Magic Quadrant (see Table 2).

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	no rating
Marketing Strategy	no rating
Sales Strategy	no rating
Offering (Product) Strategy	high
Business Model	high
Vertical/Industry Strategy	low
Innovation	no rating
Geographic Strategy	no rating

Source: Gartner (September 2008)

Leaders

These are high-viability vendors with proven track records in BPA tools and high degrees of functionality or market penetration, as well as vision and business investment. They are also well-positioned for the future, because of completeness of vision — due to financial commitment and market share, technological differentiation or both. Leaders do not necessarily offer the best products for every customer project or role. However, they provide solutions that offer relatively lower risk. Leaders include Casewise, IBM, IDS Scheer, iGrafx, Mega, Metastorm and Microsoft.

At first glance, it may appear that there is a larger-than-normal number of market leaders. This is because this market Magic Quadrant contains only 13 vendors (Gartner guidelines are for 12 to 15) — most with highly competitive solutions. Vendors that did not meet the minimum inclusion and exclusion criteria we used would have been nonleaders, with most appearing in the Niche Players quadrant, generally due to weaker financial execution and vision than the leaders.

Challengers

Challengers are well-executing vendors that have less completeness of vision than leaders. In this Magic Quadrant, there is only one challenger — EMC.

Visionaries

These vendors are differentiated by innovation in technological innovation or sales and marketing innovation. However, they have not achieved the record of execution required to reach a leadership position. In this Magic Quadrant, there is only one visionary — Sybase.

Niche Players

These vendors' products can solve problems, although the vendors' vision and execution are relatively narrow in focus or lag behind leaders in some aspects of vision and execution. Customers that are aligned with the focus of a niche vendor often find that such providers' offerings are the best fit for their specialty needs. Current niche players include BusinessGenetics, Lombardi, Savvion, Sparx Systems, Tibco Software and Ultimus.

Vendor Strengths and Cautions

BusinessGenetics

Strengths

- BusinessGenetics has a unique business modeling methodology — eXtended Business Modeling Language (xBML) — which uses simple "what, who, when, where and which" questions done in a framework of rules to do process modeling.
- The xBML five dimensional models created by the xBML W5 Business Model Editor are managed in the xBML Model Manager [per Web site, but double check] and Business Modeling Enterprise Repository.
- The xBML Business Requirements Document Auto-generator uses an inference engine to translate xBML business models directly into business requirements.
- The xBML SAP Auto-Configurator uses an inference engine to translate xBML models into the five SAP configuration documents needed for SAP implementations/configurations.

- There are a number of bridges from xBML W5 to other leading BPA, IT and BPM technologies, including IDS Scheer's ARIS, IBM Rational Rose, CA ERwin and Software AG webMethods.

Cautions

- BusinessGenetics has approximately a 1.9% revenue share of the BPA tool market.
- The primary revenue source for BusinessGenetics is training and consulting in the xBML methodology, but the uniqueness of the methodology limits alternative sources of consulting and the available pool of experienced modelers using the xBML method and tools.
- As with other companies with a similar percentage of market share, BusinessGenetics must continue to deliver on client successes, as well as increased partnerships and distribution channels, for its technology to improve its market position.

Casewise

Strengths

- Casewise is rated as a visionary in the enterprise architecture tool market Magic Quadrant, and Corporate Modeler will appeal to enterprise business architects, business architects and those looking for process integration with application architects and developers.
- Corporate Modeler has good technology depth, breadth and coverage. The Casewise Web Portal is a complementary module to the Corporate Modeler Suite, which offers direct access to the tools' extensible repository via a Web browser.
- BP architects will like the large number of predefined process models and best-practices frameworks. Many of Casewise's models and frameworks have been endorsed and certified externally by the appropriate governing body; for example, Casewise is the TM Forum's model custodian for the eTOM framework.
- Casewise has introduced an innovative solution to managing the complex overlaps among multiple regulatory compliances, International Organization for Standardization standards and best-practice frameworks that it calls "compliance cartography." More broadly, Casewise addresses the area of GRC with its GRC Accelerator.
- Casewise can be an excellent alternative to more-complex and expensive tools — especially IDS Scheer's ARIS.
- Corporate Modeler includes bridges into many leading BPMSs. Casewise recently launched its "Corporate Synergy" solution; this new capability delivers comprehensive BPM capabilities that provide a simple and efficient way to automate the execution of process content via Web services.

Cautions

- Casewise has approximately a 3.4% revenue share of the BPA tool market.
- Organizations with a BPA focus that are not interested in architecture or methodological rigor may find Corporate Modeler overly complex and costly for their needs — although it is possible to deploy Corporate Modeler in a manner where less-sophisticated modelers can be productive.

EMC

Strengths

- EMC is rated as a challenger in the BPMS tool market.
- Enterprises that started with EMC's BPMS and want to add integrated process modeling should view its Documentum Process Suite BPA tools as a complementary and natural extension.
- EMC's BPA tools focus primarily on BP analysts and BPMS modelers, although the tools have rich analysis, reporting and simulation capabilities that also appeal to BP architects.
- EMC provides BP and BPMS modelers with free prebuilt models (industry-specific and horizontal solutions) and integration with the broader EMC BPMS.
- EMC and Microsoft have a joint sales partnership focused on BPA, enabling organizations to import and transform Visio process diagrams into complete process models in the EMC BPA environment.
- EMC is working with its thousands of sales personnel and consulting group partners to sell BPA along with its focused solutions.

Cautions

- EMC has a Gartner-estimated 2.9% revenue share of the BPA tool market.
- As with other BPMS vendors offering a stand-alone BPA tool, EMC must continue to grow sales beyond the users of its BPMS.

iGrafx

Strengths

- iGrafx's BPA tools hit the "sweet spot" of buyers as they focus on the business/BP architect and analyst buyer categories, with additional capabilities for those in the enterprise business architect, business architect and BPMS modeler categories.
- iGrafx's BPA tools are repository-based and come with collaboration and communication functionality, strong analysis, and change and configuration management capabilities that support compliance and coordination of teams across the enterprise.
- Organizations looking for a solution from a single vendor that includes Visio-like capabilities and support for business/BP architects and analysts should consider the iGrafx suite of repository-based tools.
- iGrafx FlowCharter can be used to meet the modeling needs of business users and less-skilled business modelers.
- iGrafx Process addresses the needs of BP analysts, including ease of use for BPI methodologies.
- iGrafx Enterprise Modeler and iGrafx Process for Six Sigma address the needs of business/BP architects, with the robust methods and leading-edge functionality they require.

- iGrafx BPA tools include bridges into many leading BPMSs.

Cautions

- iGrafx had a Gartner-estimated 3.5% revenue share of the BPA tool market.
- Like other companies with a similar size market share, iGrafx must continue to deliver on client successes and must increase partnerships and distribution channels to improve its position in the Leaders quadrant.

IBM

Strengths

- IBM is rated as the leading vendor in the enterprise architecture tool market Magic Quadrant, with its recently acquired Telelogic System Architect, which will appeal to enterprise business architects, business architects and those looking for process integration with application architects and developers.
- IBM is rated as a leader in the BPMS tool market, with its breadth of technology, including WebSphere Business Modeler (WBM), WebSphere Process Server, FileNet BPM, WebSphere Business Monitor, WebSphere Dynamic Process Edition and WebSphere Business Services Fabric. IBM positions Telelogic System Architect as its enterprise architecture and business/BP architect and analyst tool of choice and WBM for those focused on BP analysis and process flow modeling.
- With the combination of Telelogic System Architect and WebSphere Business Modeler, IBM has a Gartner-estimated 16.4% revenue share of the BPA tool market (almost evenly split between the two tools).
- IBM is a leader in business requirements management and IT (object-oriented analysis and design) modeling, data modeling/database design and Java application development, with bridges between Telelogic System Architect and IBM's other tools.
- Unlike most BPA tools, Telelogic System Architect has full life cycle data modeling/database design and schema generation capabilities that assist BP architects and analysts in relating processes to data at multiple levels and promote better understanding between business and IT personnel.
- System Architect supports a variety of BP methods, reference models and frameworks, specifically for vertical industries and industry solutions, including telecom (New Generation Operations Systems and Software), supply chain (Supply Chain Operations Reference model) and federal financial models (Integrated Reference Model Architecture). IBM also plans to support industry and financial process reference model solutions in System Architect during the next six to nine months.
- System Architect supports leading business architecture frameworks out of the box, including Zachman, TOGAF, Treasury Enterprise Architecture Framework, Federal Enterprise Architecture Framework and X11 Disk Activity Feedback.
- Customers frequently cite Telelogic System Architect as a good solution for organizations seeking a single enterprise architecture and BPA tool.
- Many Telelogic Systems Architect customers report that their selection was influenced strongly by Telelogic's offering of a complete application development and requirements management suite of tools to complement and integrate with System Architect for

business process improvement (BPI) projects. With the IBM acquisition, these options are enhanced, and new doors opened for BPI projects doing BP composition using System Architect as part of using IBM's BPMS.

Cautions

- IBM must increase its focus on providing more out-of-the-box support for a greater number of BP methods, frameworks and content, as well as a more user-friendly interface to Telelogic System Architect.
- IBM also must increase the number of partnerships with other BPM/BPMS vendors or risk being viewed as an IBM-centric BPA tool.

IDS Scheer

Strengths

- IDS Scheer has a Gartner-estimated 15% revenue share of the BPA tool market.
- IDS Scheer is rated as a leader in the enterprise architecture tool market Magic Quadrant, and its ARIS BPA tool will appeal to enterprise business architects, business architects and those looking for process integration with application architects and developers.
- ARIS is one of the most comprehensive enterprise and BP architecture toolsets in the market, with strong support for a wide variety of standards, methods and frameworks.
- ARIS is OEMed as Oracle's enterprise architecture and BPA modeling tool of choice for its development environment, packages and BPMS.
- ARIS is also OEMed as SAP's enterprise architecture and BPA modeling tool of choice for its development environment and packages.
- ARIS includes features such as ABC, balanced scorecard, KPI management and business rule design, while BAM capabilities are offered in IDS Scheer's ARIS Process Performance Manager and simulation in ARIS Business Simulator.
- Buyers that focus on BP analyst and BPMS tool categories will find that ARIS provides added value in extensive, predefined industry-specific content and horizontal reference models to jump-start their BP modeling efforts.
- ARIS includes bridges into leading BPMSs.
- IDS Scheer recently created a workflow solution (engine) to automate its own governance process.
- Organizations with a BPMS focus should consider augmenting the modeling tools of their BPM component with ARIS for the architects in their organizations.

Cautions

- Enterprises with a BPA focus that are not interested in architecture or methodological rigor tend to find ARIS overly complex and costly for their needs — although it is possible to deploy ARIS in a manner in which less-sophisticated modelers can be productive.

- Customer experience satisfaction of IDS Scheer clients would be higher with the addition of more role-based interfaces for ARIS.

Lombardi

Strengths

- Lombardi is rated as a leader in the BPMS tool market Magic Quadrant, with Teamworks.
- Enterprises that started with Lombardi's BPMS and want to add integrated process modeling should view its BPA tool, Blueprint, as a complementary and natural extension.
- Blueprint focuses on BP analysts and BPMS modelers looking to develop business plans and business cases; relate them to key performance goals, indicators and BPs; and view this information in a variety of ways — including as a balanced scorecard.
- Blueprint helps facilitate broader user involvement in modeling at an earlier stage in the decision-making process, thus increasing buy-in by stakeholders.
- Blueprint contains lightweight process modeling capabilities; it is not intended to be a direct competitor to the leading BPA tools used by enterprise and business/BP architects, but it can be used along with them as a complementary process planning and analysis tool.
- Lombardi reports that 61% of its Blueprint customer base had used Visio before switching to Blueprint and that 35% did not use a BPA tool prior to Blueprint. Blueprint provides structure and framework without having to know about best practices or methodologies, resulting in clients reporting a positive client experience.
- Blueprint comes with a shared repository of modelers that includes real-time discovery and collaboration and revision history and audit trail.
- Blueprint software executes on servers managed by Internet hosting provider, Rackspace, which enables BP analysts and BPMS modelers to start working immediately with Blueprint, as opposed to waiting for IT personnel to install and manage the software and data.
- Blueprint is licensed solely through an on-demand, software-as-a-service (SaaS) model list priced at \$50 per user per month. This includes its process modeling capabilities and support for importing and exporting Blueprint models between Teamworks and other process modeling products. Lombardi also offers a free, single-user version of Blueprint with a subset of functionality (that is, limited to 10 processes maximum, with no Microsoft Visio import and no export to Microsoft Word or Teamworks).

Cautions

- Lombardi has a Gartner-estimated less than 1% revenue share of the BPA tool market.
- Lombardi supports only bridges to BPMSs, such as Teamworks, which accept Business Process Definition Metamodel input (as opposed to BPEL, which is the most common model interface for BPMS tool use).

- As with other vendors of a similar size market share, Lombardi must continue to deliver on client success and must increase partnerships and distribution channels to improve its position in the Leaders quadrant.

Mega

Strengths

- Mega is rated as a challenger in the enterprise architecture tool market Magic Quadrant, with a comprehensive set of tools for modeling in its repository-based Mega Modeling Suite, which includes comprehensive support for business, technology, data and application architecture modeling.
- Mega Modeling Suite includes tools that focus on the BP modeler category of buyer, including Mega Process and Mega Simulation for BP modeling and simulation.
- It has a companion product that addresses GRC issues (that is, the U.S. Sarbanes-Oxley Act and Basel II requirements) called Mega GRC Platform, and its Mega Advisor technology provides business users with dynamic Web access to enterprise blueprints and operational data about process performance and risk.
- Mega Modeling Suite can perform a variety of modeling and specification tasks to enable more-sophisticated modelers and architects; however, Mega's platform parameterization, filters and options enable each user to benefit from the simplest interface, customized to each person's needs.
- Mega Modeling Suite includes information and data architecture tools that provide data modeling, SQL and XML schema generation, as well as reverse-engineering features that can be of use to process analysts.
- Mega Modeling Suite also has quality management, balanced scorecard, KPI management and business rule design, as well as BP simulation and BAM capabilities based a partnership with Systar.
- Mega generally has deep and long-term relationships with its clients through successful engagements; as a result, its customer service ratings are among the highest reported to us in the BPA tool market.
- Mega Process generates BPEL for use by rule engines and BPM tools, and Mega Modeling Suite integrates with the tools of various BPM tool vendors.

Cautions

- Mega has a Gartner-estimated 2.6% revenue share of the BPA tool market.
- As with other vendors of a similar size market share, Mega must demonstrate that it can execute on its vision for improving its business model to improve its position in the Leaders quadrant.

Metastorm

Strengths

- Metastorm is rated as a leader in the BPMS tool market Magic Quadrant.

- Enterprises that started with Metastorm's BPMS and want to add integrated process modeling should view Metastorm's ProVision BPA tool as a complementary and natural extension.
- Gartner estimates that 65% of ProVision's sales are focused on business/BP architects, 20% on BP analysts and 15% on enterprise architects — making it well-positioned to meet the needs of multiple BPA roles.
- Metastorm is rated as a challenger in the enterprise architecture tool market Magic Quadrant; however, BP architects and analysts say that ProVision is one of the easiest BPA tools to use, making it a good solution for organizations seeking one tool that can support enterprise architecture and BPA.
- There is a high degree of market awareness of ProVision; Metastorm is one of the vendors for which we get the most inquiries by name (only Visio and ARIS have more), and ProVision appears on the largest number of finalist lists of Gartner clients.
- Based on Gartner customer feedback, ProVision has one of the highest customer satisfaction ratings in the BPA market.
- ProVision has robust features, such as simulation, ABC and the ability to take execution data back into its analytics dashboard.
- ProVision includes bridges into many leading BPMSs.

Cautions

- Metastorm has a Gartner-estimated 3.4% revenue share of the BPA tool market.
- As with other vendors of similar size and market share, Metastorm must continue to deliver on client successes and must increase partnerships and distribution channels to improve its position in the Leaders quadrant.

Microsoft

Strengths

- The low cost and ease of use of Microsoft's BPA tool, Visio, have resulted in Microsoft having, by far, the largest number of implementations of any process modeling tool. Gartner estimates Visio revenue in the BPA tool market to be approximately \$140 million (a 34% revenue share of the BPA tools market).
- Microsoft Visio focuses on enabling the visual documentation, analysis and design of a range of systems and BPs, and is a core component of Microsoft's process management disciplines, including those related to quality, compliance and BPM.
- Visio's ability to use Word, Excel and PowerPoint files from Microsoft Office — where most organizations store knowledge about their BPs — makes Visio popular with the average business user.
- Due to cost, ease of use and integration with Microsoft Office, Visio tends to be the first tool that architects and analysts in most organizations use when they start their BPI initiatives, possibly adding a more robust BPA product. Global Enterprise Managers' GemWorX and Orbus Software's iServer are tools that can extend Visio (see the Honorable Mention section of this research).

- BP architects and analysts and BPMS modelers can transform Visio diagrams into a graphical front end for line-of-business data, visualize information stored in Visio in multiple formats, including viewing KPIs on top of BP diagrams or in the context of data's source, and can view process and production data in the form of value stream maps or cause-and-effect diagrams.
- Visio includes prebuilt process templates for use by business architects and analysts to jump-start process modeling efforts — such as those for the factory floor process, PC assembly process flow, supply chain workflow and fault tree analyses.
- Microsoft has a strong partnering strategy with Visio, including BPM partners such as Simul8 and Ascentn.

Cautions

- Although Visio can be a low-cost, easy-to-use way to get started with BPA, most BP architects and analysts will not consider it a direct competitor to any other market leaders in functions and features.
- If and when Visio customers need greater functionality for enterprise and business/BP architects and analysts, they should look to Visio partners or should consider acquiring a complementary BPA tool with a Visio bridge.

Savvion

Strengths

- Savvion is rated as a leader in the BPMS tool market.
- Enterprises that started with Savvion's BPMS and want to add integrated process modeling should view its Process Modeler BPA tool as a complementary and natural extension. Savvion reports that Process Modeler and its Process Asset Manager are stand-alone products sold separately and usually precede the sale of its BPMS.
- Savvion provides BPA functionality for business/BP architects and analysts and, with its Business Process Center, expands process management to BP owners and participants who are responsible for audits and controls.
- Savvion also provides BPA functionality as a part of its process design studio (automation studio) for BPMS modelers.
- Savvion reports that there have been more than 100,000 downloads of its BPA tool, Process Modeler, although it is difficult to track the use of the tool once it's downloaded.
- Savvion charges an average price per seat of \$799 for Process Modeler, making it one of the lower-cost alternatives in the market.
- A purchasable Process Asset Management repository is available for \$50,000 to share process models and associated artifacts, such as documentation, layout of user interfaces and subprocesses. A typical enterprisewide sale of the Savvion BPA solution starts at \$100,000.
- Process Modeler comes with tabular views of process definitions for greater ease of use than most tools and, with new Savvion Business Expert, provides greater support for monitoring and metrics.

- Process Modeler can create, manage and print large process models (the lack of which is a shortcoming of many other tools) and comes with good technology features, such as advanced goal-based simulation and granular simulation for ABC for system, human, consumable and nonconsumable resources.
- Savvion has added a "project-oriented processes" use scenario into modeling that brings project portfolio management and process analysis together, and includes Microsoft Project import and export capabilities.
- Savvion provides vertical templates and process models for the telecommunications, ITIL, financial services and clinical trials domains.

Cautions

- Savvion has less than a 1% revenue share of the BPA tool market.
- As with other BPMS vendors offering a stand-alone BPA tool, Savvion must continue to grow sales beyond the users of its BPMS.

Sparx Systems

Strengths

- Sparx Systems Enterprise Architect is best-known as the leading object-oriented analysis and design tool, with good data modeling/database design capabilities that support application and data architects, analysts and developers, having released built-in BPMN support in 2007 (this had been available previously through a plug-in).
- Enterprise Architect customers should view extending its use of into business architecture and process modeling as a complementary and natural extension.
- Business/BP architects and analysts in organizations who are not currently enterprise architect customers also will find Sparx of interest as a low-cost provider with good technology: \$135 per seat for the Enterprise Architect Desktop Edition (for those who do not need BPMN nomenclature), \$199 per seat for the Professional Edition (which includes BPMN support out of the box) and \$335 for the Corporate Floating Edition (which allows sharing of seats). The cost of 100 licenses is approximately \$11,000 for the Desktop Edition and \$28,500 for the Corporate Floating Edition. All software is downloadable from the Sparx Web site.
- Since its commercial release in 2000, Enterprise Architect has more than 150,000 licensed users worldwide. Sparx reports that more than 55% of the top 100 global firms have volume licenses of Enterprise Architect.
- Despite the low cost of Enterprise Architect, Sparx is known to deliver high-performance, scalable tools that are suited for enterprisewide deployment.
- Sparx's Model Driven Generation technology provides Enterprise Architect links into Microsoft Visio and Visual Studio and Eclipse (Java) open-source tools. It supports numerous standards and frameworks, including Common Object Request Broker Architecture, Systems Modeling Language, Zachman Framework, Data Distribution Service, DoDAF and Ministry of Defense Architecture Framework.
- Enterprise Architect can model, document and restructure processes and information flows using industry-standard BPMN and UML, and the process designs and models

can be used to drive software development, including reverse engineering of legacy code and database models and round-trip synchronization with C, C++ and Java code.

Cautions

- Sparx has less than a 1% revenue share of the BPA tool market.
- As with other application and data architecture, analysis and design modeling tool vendors that also offer BPA tool capabilities, Sparx must continue to grow sales beyond the users of its Enterprise Architect customer base to reach the Leaders quadrant.

Sybase

Strengths

- Sybase PowerDesigner is best-known as the leading data modeling/database design tool, and with PowerDesigner Studio, it includes object-oriented analysis and design capabilities for application architects, as well as BP modeling capabilities for BP analysts.
- Sybase is rated as a niche player in the enterprise architecture tool market Magic Quadrant with PowerDesigner Studio.
- Enterprises that started with PowerDesigner for data architecture should view extending its use of into business architecture and process modeling as a complementary and natural extension.
- Customers generally highlight PowerDesigner Studio's strengths as intermodel integration and traceability, the ability to rapidly add new model types and artifacts and relate them to existing ones, as well as ease of extracting and formatting captured information for dissemination.
- PowerDesigner Studio supports simulation and ABC through partner product, Simul8.
- PowerDesigner Studio has a fully integrated "requirements" model that can capture requirements, store and manage business rules definitions, business goals and more.
- PowerDesigner Studio can link the goals, rules and requirements not only to each other from multiple document views, but also to any design artifact — from BP models to logical and physical data models, IT object-oriented/UML models and others.

Cautions

- Sybase has a Gartner-estimated 3% revenue share of the BPA tool market.
- PowerDesigner Studio currently lacks some facets found in market-leading products, including BAM, predefined architectural frameworks, vertical-market models and content, and bridges into leading BPM/BPMS technologies.
- As with other data modeling/database design tool vendors that also offer BPA tool capabilities, Sybase must continue to grow sales beyond the users of its base of PowerDesigner data architects and analysts to reach the Leaders quadrant.

Tibco Software

Strengths

- Tibco Software is a leading provider of business integration and process management software.
- It is a leader in the BPMS Magic Quadrant with iProcess Suite, which includes a BPA tool, Business Studio, that will appeal most to those in the BPMS modelers category.
- Enterprises that started with Tibco Software's BPMS and want to add integrated process modeling should view its Business Studio BPA tool as a complementary and natural extension.
- Tibco Software's focus for Business Studio is on BP architects and analysts and BPMS modelers to develop executable process models.
- Tibco offers its BPA tool for free, with maintenance for \$500 per user per tool.
- Tibco reports that there have been more than 50,000 downloads of its BPA tool, Business Studio, although it is difficult to track the actual use of the tool. (Business Studio is downloadable from [Business Studio Developer Center](#)). Tibco Software's entire product suite (including Business Studio) offers an end-to-end BPM solution in the range of \$150,000 to \$300,000.
- Tibco Software has built an extensive support network through its developer site for Business Studio and provides periodic webinars, tutorials and white papers to encourage users to become familiar with all aspects of the product.
- Business Studio is an Eclipse-based, open-source solution that comes with simulation and BAM capabilities, support for rules and analytics.
- Enterprise architects use Business Studio to do service component architecture (SCA) composition and to develop Java and .NET services. The development of .NET is done through plug-ins to Visual Studio .NET and via support for importing .NET assemblies into Business Studio for SCA composition.
- Business Studio supports UML 2.0 and UML profiles, and comes with bridges for Microsoft Visio, IDS Scheer's ARIS, XML Process Definition Language and XML.
- Business Studio has the ability to create and import methodology templates, such as the P2 methodology from the U.K., and provides best practices in a library of BPMN fragments and modeling patterns.

Cautions

- Tibco Software has a Gartner-estimated revenue share of less than 1% of the BPA tool market.
- As with other BPMS vendors offering a stand-alone BPA tool, Tibco must continue to grow sales beyond the users of its BPMS.

Ultimus

Strengths

- Ultimus is rated as a visionary in the BPMS tool market Magic Quadrant with Ultimus Adaptive BPM Suite.
- The Ultimus BPA tool, Process Designer, focuses on BP architects, analysts and BPMS modelers looking to model, automate, manage and optimize BPs.
- Because Ultimus BPA tools are the BP modeling components of its Ultimus BPM Suite, customers should consider the extended use of the Ultimus BPA tools at the architecture and analysis levels of modeling (in addition to the physical and workflow levels of process modeling), rather than consider a third-party, best-of-breed solution, although the latter remains an option.
- Process Designer sells for approximately \$300 for a workstation-based, project-level seat.
- The product includes strong simulation, dashboarding and ABC, and comes with many people-centric capabilities.
- Ultimus has a complementary BAM tool — the iBAM Suite — which captures and displays KPIs from live process data and third-party applications and supports "deep dive" analytics.
- When using the Ultimus iBAM Suite, which leverages the Ultimus Adaptive Discovery technology, in conjunction with Process Designer, complete round-trip optimization of processes is enabled, making it possible to dynamically complete a feedback loop for process improvement.
- When iBAM is combined with Ultimus Enterprise Performance Manager (EPM), it extends optimization capabilities to the Ultimus Adaptive BPM Suite. However, these models can be used outside the Adaptive BPM Suite to analyze and optimize any data store, including a tight integration with Microsoft Visio and IDS Scheer's ARIS.
- Ultimus offers a two- to three-seat package of Process Designer, combined with iBAM and EPM, for approximately \$3,000 to \$5,000.

Cautions

- Ultimus has a Gartner-estimated less than 1% revenue share of the BPA tool market.
- As with other BPMS vendors offering a stand-alone BPA tool, Ultimus must continue to grow sales beyond the users of its BPMS.

RECOMMENDED READING

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

"Understanding Vendor Placement in the BPA Tools Magic Quadrant"

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, skills and so on, 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 of the individual business unit to continue investing in the product, to continue offering the product and to 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, 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

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 Web site, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling product 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 set 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 verticals.

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.

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