

September Sponsor

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The BPMS Market and the Majors

During the past few months we have observed a number of moves by major business players that suggest that the Business Process Management (BPM) market is slowly but surely gaining momentum.

Probably the most obvious move was IBM's announcement, in mid-August, that it had agreed to acquire FileNet for \$1.6 Billion in cash. FileNet was founded in 1982 and established itself as a content management company. As the BPM market heated up, FileNet brought its FileNet Business Process Manager product to market and seemed, for awhile, to be content to simply extend its content management franchise by offering content-based BPM. IBM's acquisition will obviously lead to the incorporation of FileNet's content management capabilities into IBM's Enterprise Content Management suite. This move will also extend IBM's increasingly comprehensive WebSphere Business Process Management suite to deliver a broader range of BPM capabilities. Clearly, IBM is still willing to pay significant money to grow its position in the BPM space. Anyone interested in learning about IBM's diverse interests in BPM has only to go to IBM's site for developers (<http://www-128.ibm.com/developerworks>) and search on either "BPM" or "Business Process Management" or go to the new BPM Microsite at: <http://www.ibm.com/software/info/bpmsoa>

SAP is also moving to expand business process awareness to SAP developers. At its spring user conference, SAPHIRE, SAP announced that it would launch a Business Process Expert (BPx)

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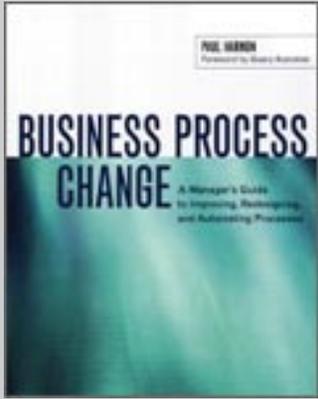
community this fall. In essence, SAP proposes to define a new business role - that of Business Process Expert (BPx) - that presumably stands somewhere between the role of business manager and business analyst, helping both to improve business processes. To encourage this development, SAP has created a section on its SAP Developer Network site that will focus on the concerns of Business Process Experts. They formally launched this month and can be accessed at

www.sdn.sap.com/irj/sdn/developerareas/bpx

The BPx community site will post articles and host a discussion forum. Some of the articles will focus on SOA and NetWeaver, SAP's BPM tool, some will be generic articles on process modeling and supply chain modeling, and some will focus on what Business Process Experts can, or should, do in their organizations.

SAP has been the leading vendor of ERP software for years. It has always been in the business process business in the sense that its modules are keyed to business processes and support companies when they seek to quickly automate processes and when they seek to build performance monitoring systems. SAP's NetWeaver represents a move into the BPMS arena and promises to make SAP ERP deployments more flexible while emphasizing how SAP modules are organized into larger business processes. There are a lot of SAP practitioners throughout the world. The move to establish a BPx community and to encourage SAP practitioners to think of a business role focused on the improvement and management of business processes will have reverberations in many different companies, and will certainly advance everyone's awareness of BPM.

Oracle's BPM product is called Oracle BPEL Process Manager. Most of Oracle's efforts, to date, have been focused on improving the BPM product it got when it acquired Collaxa, making it easier for that product to function with Oracle ERP and CRM modules. In the course of the summer, however, Oracle also decided to cut a deal with IDS Scheer to ensure their support for Oracle ERP application development. IDS Scheer's ARIS process modeling product is



already widely used to support SAP development. Adoptions to improve ARIS's support for Oracle applications will undoubtedly extend IDS Scheer's dominance in the ERP-modeling area, and it may make it easier for companies that want to shift from SAP to Oracle (or vice versa) to make such a move.

Microsoft's BPMS activity is organized around its BizTalk product. The company has not been active at major BPM conferences, but is doing evangelistic work among Microsoft developers. At their spring developer conference in Boston, for example, they had a session on BPM. They didn't announce anything new, but indicated that they are continuing to develop BizTalk and that they are still working to determine how to best support business process development within the Microsoft community. Separately, there are, of course, several interesting BPMS vendors who have tools that run on top of Visio and .NET. Presumably, Microsoft has studied them and could acquire products whenever it wants to accelerate its BPM efforts.

Microsoft has established a BizTalk Server Developer Center site on the Microsoft Developer Network;
<https://msdn.microsoft.com/biztalk/default.aspx>
that provides information on business processes within the context of BizTalk and .NET. Microsoft has scheduled a Microsoft SOA and Business Process Conference for October 3-6, at their Conference Center in Redmond, WA, which represents another effort on Microsoft's part to educate its developers about BPM. (For more information, go to the developer site listed above.)

Another interesting development has been the flurry of activity among the "other" BPM vendors. Business Performance Management usually refers to vendors interested in monitoring processes and providing management with information about business performance. The vendors in this space have usually been Business Intelligence (BI) and Data Warehouse (DW) vendors. In the past several months, there has been a rash of acquisitions. Business Objects acquired SRC, Cognos

acquired Adaytum, Lawson acquired ClosedLoop, Actuate acquired Performancesoft, and Microsoft acquired ProClarity. We believe that this activity represents a transition in the BI and Data Warehouse markets, as the major players position themselves to play expanded roles in the larger BPM market. We fully expect to see some acquisitions in the future that will combine process and BI capabilities in the same suites so the products can not only manage processes but simultaneously combine process data with other data and apply BI to generate more sophisticated management reports. IBM WebSphere BPM already does this and we expect others to follow. We won't be surprised, as the BPM market continues to expand, if one or more of the larger BI/DW vendors, like Business Objects, begins to position itself in the Business Process Management space.

Probably the major development, over the course of the summer, is subtler. All of the software/infrastructure vendors are continuing to put a lot of marketing cycles into promoting Service Oriented Architecture (SOA). At the same time, there has been a growing recognition that SOA, without BPM, doesn't mean much. You don't do SOA just as an exercise in technology; you do SOA to provide better support for business processes, which you define in BPM. This is the clear message in all IBM's WebSphere advertising and it is increasingly the common theme of all of the major vendors who are promoting the move to SOA. Thus, increasingly, the attention that was focused on BPM is becoming mixed with the SOA marketing effort.

No one of these moves, by itself, amounts to a major change in the business process landscape. Nothing is really very different this fall than it was in the spring. Taken together, however, the summer has witnessed a slight increase in activity among the major vendors who continue to make moves to adjust their resources, positioning and their alliances as they prepare to participate in the BPM market that continues to expand.

Celia Wolf

Paul Harmon

We will be presenting and participating in the following events in the next few months. If you get a chance, say hello and share your thoughts on business process development or the BPTrends website with us.

- **Proforma Users Conference**, Las Vegas, Oct 10
- **Business Rules Forum**, Washington DC, Nov 7-9
- **Shared Insights BPM Conference**, Boston MA, Nov 14-16
- **ICSSEA-2006**, Paris, France, Dec 4-7

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Business Process Trends • 88 Waban Park • Newton • MA • 02458