COMPETITOR FOCUS SERIES

Decision Matrix: Selecting a Business Process Management Vendor (Competitor Focus)

Choosing the next-generation business process management platform

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OVUM VIEW

CATALYST

Due to demand for a better understanding of the competitive landscape in the business process management (BPM) market, Ovum has developed the BPM Decision Matrix. This report explores the competitive dynamics within the BPM market, and helps businesses select a vendor based on its technology strength, reputation among customers, and impact on the market. Ovum provides a complete view of vendor capabilities and advises on those that businesses should Explore, Consider and—most importantly—Shortlist.

SUMMARY

The competitive landscape for BPM solutions is characterised by the following traits:

- The BPM vendor landscape is comparably fragmented, with several specialist vendors among the leaders.
- The market remains competitive, but stratification within the group of leading vendors profiled is increasingly apparent.
- Metastorm, Oracle and Savvion are the vanguard of the BPM market, as they combine excellence in core technologies with a clearly articulated approach to BPM.
- Active Endpoints, Appian, IBM (including Lombardi), Pegasystems and Ultimus are the primary challengers that could join the group of market leaders should they address certain limitations in their technology offering or go-to-market strategy.
- AuraPortal, Cordys, Intalio, SAP and Tibco are all slightly behind the leading group, but, depending on the user's deployment requirements, may still be the most appropriate option.

MARKET DEVELOPMENTS

VENDOR SELECTION

The vendors profiled in this report (listed in Table 1) are the market leaders in terms of BPM systems. The vendors included represent a cross-section of the BPM market, ranging from pure-play BPM specialists, through to enterprise infrastructure conglomerates and diversified enterprise application vendors.

There are plenty of other BPM systems currently available in the market; however, according to Ovum's assessment, those BPM vendors either currently fail to make a sufficient impact on the market, do not have comprehensive BPM coverage, or do not offer market-leading BPM technology. That said, Adobe and Software AG are two notable exceptions. Both vendors were approached for inclusion in the BPM Decision Matrix 2010, but due to difficulties in obtaining detailed information relating to the Technology assessment, the two vendors are not profiled in this report. Ovum will re-evaluate the vendor selection list for the next iteration of the BPM Decision Matrix, planned for 2011.

Table 1: Vendors profiled in the BPM Decision Matrix 2010 report

Active Endpoints	Appian
AuraPortal	Cordys
IBM	Intalio
Lombardi	Metastorm
Oracle	Pegasystems
Savvion	SAP
Tibco	Ultimus

Source: Ovum

Consolidation has proceeded unabated since the last BPM Decision Matrix was published

Since the publication of the previous BPM Decision Matrix (April 2008, DMTC2176), vendor consolidation in the middleware market has continued unabated. The most notable event in the intervening period was the acquisition of BEA by Oracle. Product integration proceeded quickly, and Oracle has already taken its integrated BPM portfolio to market.

During the research phase for the current report, two of the vendors being profiled were acquired. In December 2009, IBM announced its intention to acquire Lombardi, and in January 2010, Progress Software acquired privately-held Savvion. It should be noted that all end-user sentiment data, and Market Impact or Technology assessment scores were collected before the two acquisitions were announced, therefore the assessment scores are reflective of the pre-acquisition landscape.

By the time the report entered the production phase, the Lombardi acquisition had closed. On that basis, Ovum decided to place IBM and Lombardi in a single profile, but still present both sets of end-user sentiment survey data, and Technology and Market Impact assessment scores. As Progress did not have a BPM product prior to the Savvion acquisition, Ovum discusses Savvion alone, based on the information collected prior to the acquisition announcement.

In the BPM Decision Matrix, Ovum provides a summary of BPM vendors' capabilities based on a quantitative assessment of their Market Impact and end-user sentiment, as well as the technology features that they offer. The scores underpinning the Decision Matrix can be found on individual vendor radars and in Table 4 in the Appendix. Ovum also provides guidance for enterprises looking to deploy BPM technologies, and whether they should immediately Shortlist, Consider or Explore solutions from these vendors. The following definitions are used for each of these recommendations:

- **Shortlist** – these vendors' products and services should always be placed on an enterprise's shortlist for BPM technology selection. This category represents the leading solutions that are worthy of a place on most technology selection shortlists. The vendor has established a commanding market position with a product that is widely accepted as best of breed.
- **Consider** – the vendors in this category have good market positioning and are selling and marketing their products well. The products offer competitive functionality and good performance, and should be considered as part of the technology selection process.
- **Explore** – solutions in this category have less broad applicability, and may have limitations in terms of the product's functionality or the vendor's execution capability. However, they will still be suitable to meet specific requirements, and may be worth exploring as part of the technology selection process.

Because realising the value from a BPM deployment is critically dependent upon the solution's ability to execute the institution's overall BPM strategy, a decision to purchase one solution over another should be based on a broad array of factors, including (but not limited to) the degree of alignment between the solution's features and functionality, and the specific objectives of enterprise BPM strategy. As a result, Ovum's recommendations of Shortlist, Consider and Explore should be taken only within the context of an enterprise's specific solution requirements.

CORE BPM DECISION MATRIX

The Core BPM Decision Matrix includes the vendors that have registered both end-user sentiment and Technology assessment scores. The Core BPM Decision Matrix retains the conventional Explore, Consider and Shortlist category definitions.

Table 2: Core BPM Decision Matrix* 2010

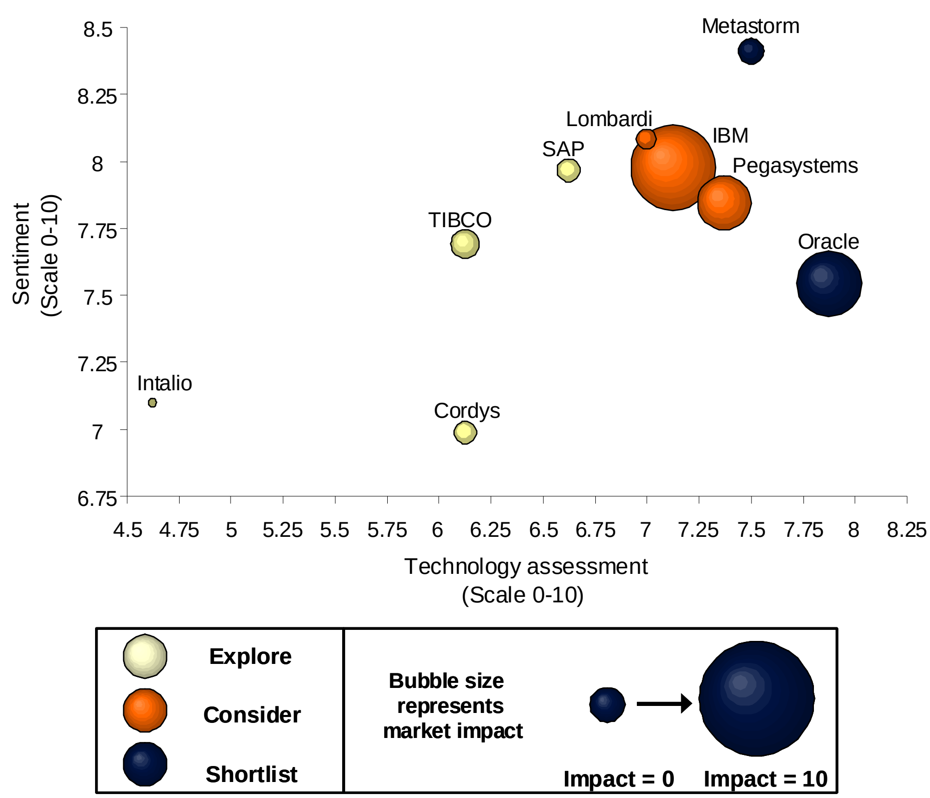
Shortlist	Consider	Explore
Metastorm	IBM	Cordys
Oracle	Lombardi	Intalio
	Pegasystems	SAP
		Tibco

Source: Ovum (* vendors listed in alphabetical order)

In the last release of the BPM Decision Matrix, the clustered Technology assessment and end-user sentiment survey scores created difficulties in classifying vendors. Stratification is slightly more apparent this time around, but the Consider and Shortlist categories are still relatively close.

For the purposes of this report, Ovum decided to prioritise end-user sentiment and Technology assessment scores. Technology forms the bedrock of a successful BPM offering, and Ovum finds that high end-user sentiment scores are indicative of successful go-to-market strategies.

Figure 1: Core BPM Decision Matrix 2010



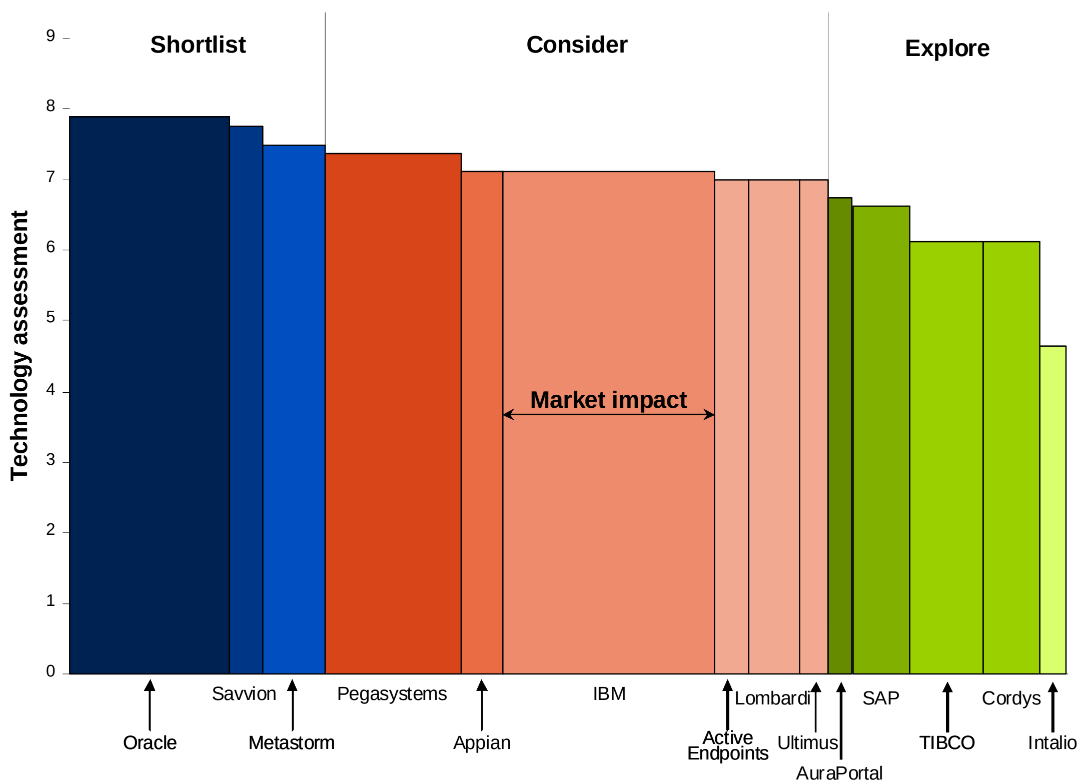
Source: Ovum

Oracle and Metastorm have been classified in the Shortlist category, while Pegasystems and IBM/Lombardi have been placed in the Consider group. Behind the Shortlist and Consider groups, follows the longer tail of the Explore category, consisting of SAP, Tibco, Cordys and Intalio. Ovum emphasises that the vendors in both the Explore and Consider categories should be benchmarked in the context of the given deployment scenario, as the respective strengths of each of the vendors may matter more than minuscule variations in the Technology assessment score.

EXTENDED BPM DECISION MATRIX

Due to the high Technology and Market Impact assessment scores garnered by certain vendors that did not accrue a representative end-user sentiment score, Ovum presents an alternative means for representing all vendors studied: an Extended BPM Decision Matrix (Figure 2). This variable width bar chart represents each profiled vendor: the column height reflects a vendor's Technology assessment score, and the width represents its Market Impact score. The Extended BPM Decision Matrix can be considered as a reduction of a traditional Decision Matrix, with the end-user sentiment variable excluded and with an additional vendor classification category.

Figure 2: Extended BPM Decision Matrix 2010: Technology and Market Impact assessment scores only



Source: Ovum

The benefit of such a reduction is that it can plot the performance of the five BPM specialists that scored particularly well in the Technology assessment exercise, but did not register an end-user sentiment score: Active Endpoints, Appian, AuraPortal, Savvion and Ultimus. Although these vendors are not included in the Core BPM Decision Matrix (Figure 1), Savvion achieved the second-highest cumulative Technology assessment mark, while others are competitive against the field in terms of Market Impact, as presented in Figure 2.

Table 3: Extended BPM Decision Matrix* 2010

Shortlist	Consider	Explore
Metastorm	Active Endpoints	AuraPortal
Savvion	Appian	Cordys
Oracle	IBM	Intalio
	Lombardi	SAP
	Pegasystems	Tibco
	Ultimus	

Source: Ovum (* vendors listed in alphabetical order)

Due to Savvion's outstanding Technology assessment score, the vendor has been added to the Shortlist group, along with Metastorm and Oracle. Appian, Active Endpoints and Ultimus are all ranked closely together in the Consider category, comparing very favourably with the market-share leader IBM and its recent acquisition, Lombardi. The Explore category remains largely unchanged, with the exception of AuraPortal, which leads the category, at least from the Technology assessment perspective, despite its relatively modest Market Impact score.

MARKET LEADERS: METASTORM, ORACLE AND SAVVION

Ovum considers Metastorm, Oracle and Savvion to be at the very summit of the BPM competitive landscape. The variation between the three vendors' scores is not pronounced enough to identify the clear leader: Oracle achieves the top Technology assessment scores and its impact on the BPM market is in the ascendancy; while Metastorm, on the other hand, compensates for its slightly lower Technology assessment score with outstanding end-user sentiment survey results.

All three Shortlist vendors are distinct. Savvion and Metastorm are both considered to be BPM specialists, yet the former predicates its success on technical excellence, while the latter adopts a business-oriented approach to BPM. Judging from both Metastorm's end-user sentiment survey results and the market success that has brought the vendor to the brink of public listing, its business-led approach to BPM can be a route to success.

Oracle, on the other hand, is an archetypal technology conglomerate. Following its Sun Microsystems acquisition, Oracle's reach now extends from processors to applications. Oracle's success in the BPM Decision Matrix highlights the significance of BPM in Oracle's technology portfolio. Already playing a more prominent role in Oracle's middleware stack, BPM is set to provide an important foundation, underpinning Oracle's enterprise application platform.

The three vendors in the Shortlist category all have two things in common: breadth of coverage that extends to all the essential elements of contemporary BPM; and neatly articulated, clearly positioned portfolios. The vendors all have elegant product portfolios, which cover a broad range of functionality, from business process analysis to execution and process analytics. Modular product lines allow the shortlisted vendors to enter customers' accounts from different angles, and engage a variety of stakeholders in the BPM discussion.

THE CHALLENGERS: IBM AND THE BPM SPECIALISTS

With the exception of IBM, all vendors in the Consider category could be considered to be BPM specialists. However, the use of such a term is questionable, given that each of the specialists adopts a notably different approach: Pegasystems continues to compete very successfully with its rules-infused platform for process-driven applications; Lombardi achieved outstanding recognition in the end-user sentiment survey, due to its insistence on process excellence; Ultimus also concentrates on line-of-business constituents, but its key focus is ease of use; Active Endpoints pitches its offerings primarily at process-focused IT developers; and while Appian has far broader ambitions, at this point its capabilities as a platform seem to be more robust than its process analysis features.

The common theme among these vendors is their relative success during the difficult market circumstances in 2009. These vendors found a way to serve constituencies previously ignored by BPM incumbents, middleware conglomerates and stack vendors alike. A number of the specialist challengers are also making progress with alternative models of delivery. In this regard, Ovum singles out Appian, due to its multi-modal deployment options, and Lombardi, in particular its process discovery and analysis tool, which remains the leader in what is fast becoming a thriving segment of the BPM market.

In addition to the BPM specialists, IBM is also classified in the Consider category. Compared to its position in the last iteration of the BPM Decision Matrix, this is an improvement. However, IBM still has some way to go, primarily in structuring its portfolio and refining its go-to-market approach, if its Technology assessment and end-user sentiment scores are to justify its dominant Market Impact or match its ambitions. From that point of view, IBM's acquisition of Lombardi is of crucial importance. Should IBM grasp the opportunity to unify its BPM portfolio, the vendor would have a genuine opportunity to enhance its standing in future BPM Decision Matrix benchmarks.

In terms of the Consider vendors' chances of catching up with the market leaders, they all face much the same challenge: specific limitations in their technology portfolios and the ability to support all types of process patterns with a single, well-organised portfolio. Of course, this is not to say that the Consider vendors cannot be successful in their chosen areas of focus. In fact, their solid performance during the downturn indicates much to the contrary.

Given the pace of the evolution of enterprise technology, all of the vendors in the Consider category should work hard to evolve their unique points of differentiation. Pegasystems is a particularly good example of such an imperative. Outstanding financial performance notwithstanding, many of Pegasystems' competitors have successfully integrated at least some business rules capabilities, therefore eroding Pegasystems' competitive advantage. Pegasystems retains the close integration between rules and processes, and its object model is likely to remain unique. Nevertheless, it is apparent that Pegasystems should avoid complacency, and so should other vendors. For instance, Appian's single-code base, multi-modal on-premises/software as a service (SaaS) delivery model may be appropriate at this stage of the market adoption of cloud computing, but without evolving its long-term strategy, Appian may risk being overtaken by SaaS-native, fully cloud-based BPM platforms, particularly if the adoption of cloud computing proceeds more rapidly than anticipated.

THE PROSPECTS: AURAPORTAL, CORDYS, INTALIO, SAP AND TIBCO

Vendors classified in the Explore section retain very specific physiognomies, and should by no means be considered niche offerings. Nevertheless, the Explore vendors all share a common trait: they lack the breadth of appeal of the vendors in the Shortlist category. This lack of coverage is typically the product of either the business model (Intalio), a radical product strategy (Cordys), a decision to cater for a specific segment of the market (AuraPortal), or vendor heritage (SAP, Tibco).

This means that savvy IT decision-makers ought to keep a very close watch over the Explore vendors. Should an organisation be willing to buy into a market-defining vision or should it have a specific type of requirement, vendors classified in the Explore category are likely to present a very competitive option. Moreover, it could well be the case that one of the Explore vendors is catering for a specific market segment. For example, AuraPortal and Intalio can serve the regions often overlooked by the larger vendors, while Cordys offers excellent opportunities for process channel partners such as telecommunication service providers, and Tibco and SAP have deep footprints and profound expertise in specific industries.

Just like the vendors classified in other categories, the Explore vendors should not be complacent. With targeted improvements to their portfolio or go-to-market strategy, some of these vendors have a good chance of improving their standing in the BPM market and the future BPM Decision Matrix benchmarks. In this regard, Ovum points to Tibco, which has a portfolio of middleware technologies that collectively presents a very strong proposition. With more focus on BPM and a more eclectic marketing strategy, the vendor could compete at the very top of the market. Equally, vendors have to be aware of offerings from new vendors that can disrupt their propositions or erode their competitive differentiation.

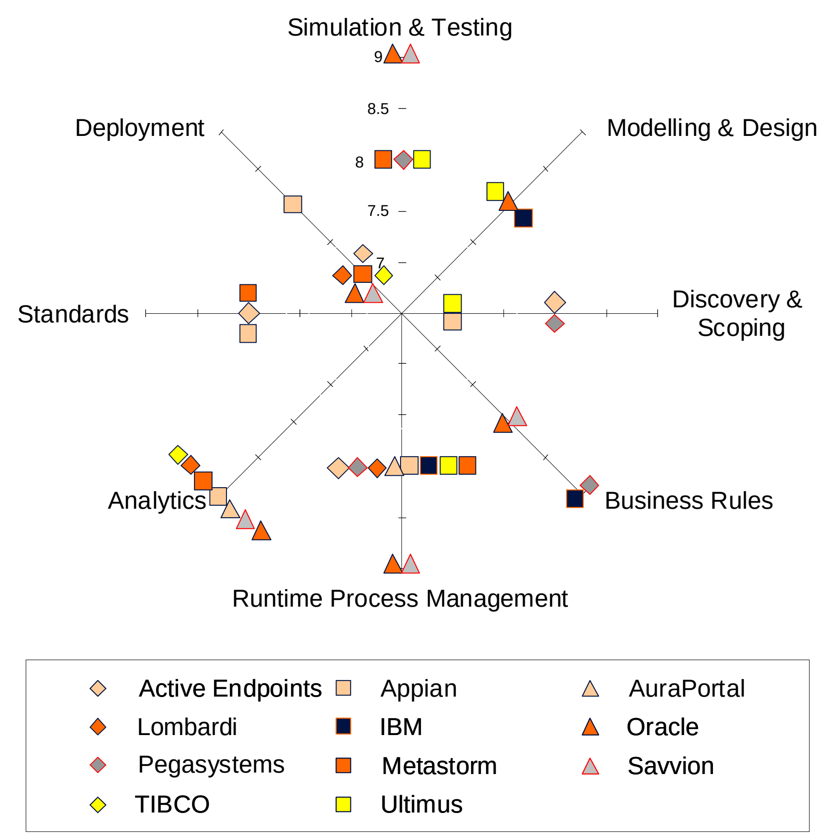
MARKET LEADERS

As the competitive landscape may vary significantly across the areas covered by Ovum's Decision Matrix (Technology, User Sentiment and Market Impact), it is important to consider these categories separately in order to develop a more complete understanding of each vendor's particular strengths and weaknesses, and why it has been assigned a Shortlist, Consider or Explore rating. In the following section of this report, Ovum will present the market leaders for each area and then discuss how they vary across the sub-criteria within the assessment areas.

MARKET LEADERS: TECHNOLOGY ASSESSMENT

The first notable characteristic of the Technology assessment market leader graph is the presence of 11 out of 14 vendors profiled, which highlights that the BPM market remains competitive. Although the vendors from the Shortlist category feature more frequently than the others, no vendor repeatedly appears as the market leader. Moreover, in only one out of the eight Technology assessment categories does a single vendor hold the top score.

Figure 3: Market leaders analysis: Technology assessment



Source: Ovum

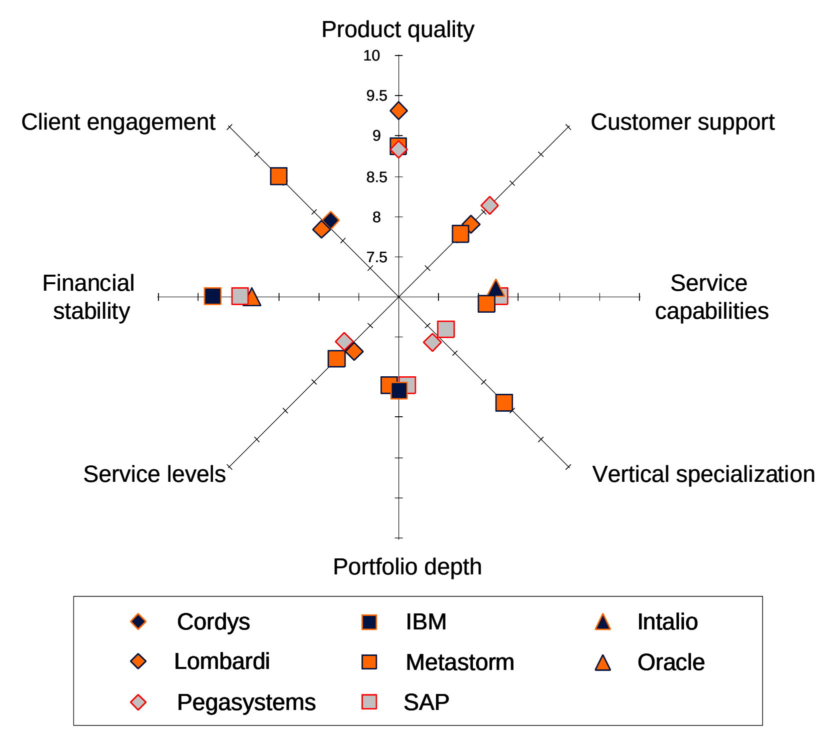
Ovum notes that vendors figure in specific areas of assessment. There is a split between the execution and deployment categories (such as Deployment, Standards, Runtime Process Management and, to an extent, Business Rules) on the one hand, and the process-handling categories (Modelling, Discovery, and Simulation and Testing) on the other.

This pattern highlights the ongoing rift between the vendors that are focused primarily on process execution or integration and those that approach BPM from a process modelling background. This division is perpetuated by the increasingly artificial conceptual split between the systems-centric and human-centric processes. Such a split hinders rather than helps business; therefore, a successful contemporary BPM package ought to support the full range of process patterns, which should hopefully, lead to a less-pronounced split in future.

MARKET LEADERS: USER SENTIMENT

User Sentiment scores, derived from an independent survey of IT decision-makers and practitioners that have deployed or formally evaluated BPM packages, serve as a direct gauge of a vendor's market perception. Looking at the results plotted in Figure 4, it is apparent that a pattern emerges: BPM specialist vendors that have adopted a simple, business-led approach to BPM as a discipline, and not merely a technology, have impressed the market. In this regard, the performances of Metastorm (which features on the market leader graph in all but one category), and Lombardi (which leads in terms of product quality and features in three more categories) are worthy of note.

Figure 4: Market leaders analysis: User Sentiment



Source: Ovum

Such performance highlights the specific nature of the current BPM market. After all, process management is fundamentally a business issue. A BPM vendor's success depends on delivering the right skills, tools and content to the right stakeholders in an organisation. Of course, a solid technology platform is a prerequisite for success, but technical features alone cannot meet the needs and expectations of customers' BPM initiatives. Ovum hopes that these survey results will serve as further endorsement for the need to adopt a fresh approach to BPM, focused on the needs of the full range of business stakeholders involved.

Although Intalio features among the market leaders only once (in the Service Capability category), Ovum finds this worthy of comment. Intalio's business model is predicated on its ability to provide customer value through service subscriptions. Judging from the excellent scores in the Service Capability category, the market is recognising the vendor's ability to offer outstanding service. In Ovum's opinion, Intalio's performance in terms of Service Capability is a clear indicator that alternative commercial models can lead to market success.

BPM specialists may have performed very well in the end-user sentiment survey, but large conglomerates have some reasons for optimism. Predictably, they dominate the Financial Stability category. With the relentless consolidation taking place in the enterprise technology market, this is clearly an important factor. More to the point, SAP's sterling performance in the BPM end-user sentiment survey demonstrates that conglomerates command powerful brands that can enhance perceptions of a vendor in adjacent segments of the market. Ovum believes that exploiting such a 'halo effect' in the BPM market may be an important factor in the future, as vendor consolidation continues. Consequently, conglomerates ought to protect their brands and strive to offer value in all segments in which they operate, lest any disappointing perceptions are transferred between market segments.

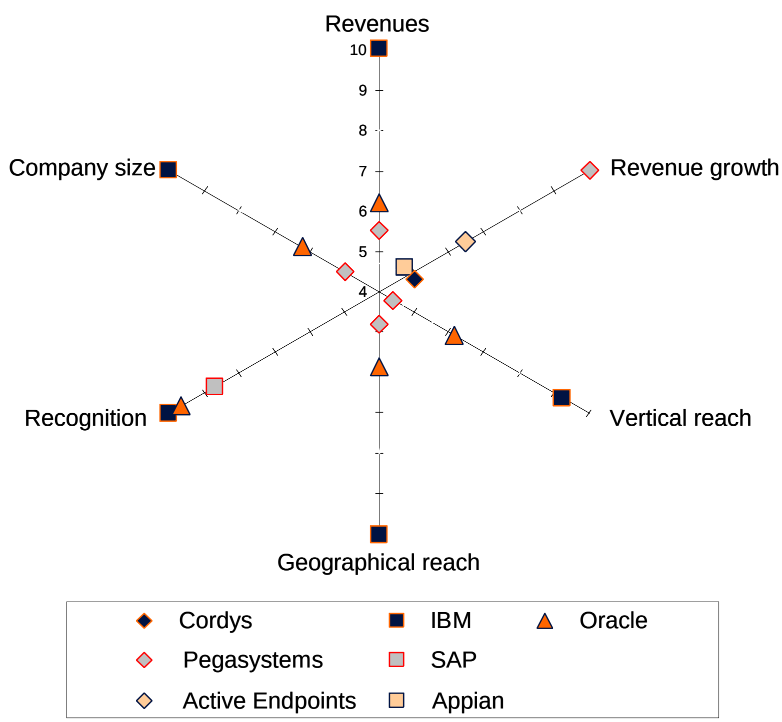
MARKET LEADERS: MARKET IMPACT

The Market Impact assessment is driven by the revenues that a vendor is able to extract from the market, the distribution of those revenues across the market segments, and vendor brand strengths. A brief examination of Figure 5 shows that IBM remains the market leader in the Market Impact assessment. It is also apparent that Oracle, and to a lesser extent Pegasystems, are catching up.

The fact that large conglomerates (IBM, Oracle and SAP) dominate the Recognition category may be a bad sign for BPM specialists, as clearly, the halo effect of big brands is in full force in the BPM market. As a consolation, however, BPM specialists should be encouraged by the Revenue Growth category. Impressive growth rates registered by the likes of Active Endpoints, Appian, Cordys and Pegasystems demonstrate that smaller vendors have been able to thrive in the downturn.

The comparably weaker performance of conglomerate vendors demonstrates not just the difficulty of maintaining high growth rates from a higher revenue base, but also the fact that an alternative approach to BPM was in demand in 2008 and 2009. A particularly anaemic performance from Tibco in the Revenue Growth category should be considered a cautionary tale that shows that the BPM market is becoming increasingly diverse, and that alternative strategies may be required, should IT spending continue to be restrained.

Figure 5: Market leaders analysis: Market Impact



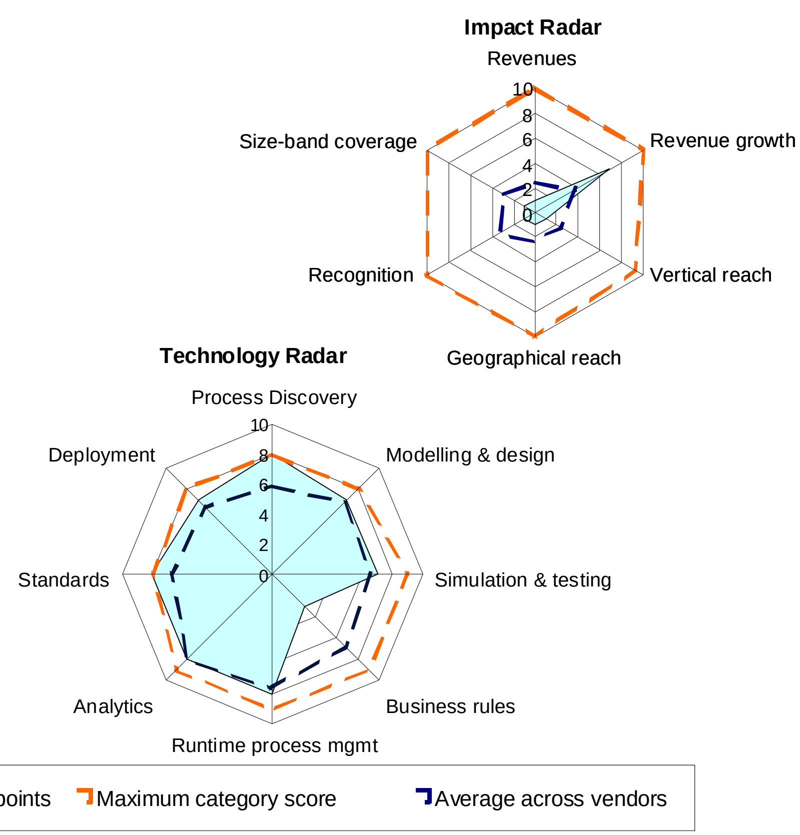
Source: Ovum

VENDOR ANALYSIS

ACTIVE ENDPOINTS: BPM RADARS

Active Endpoints’ ActiveVOS 7.0 could be considered as typical of the contemporary generation of BPM suites (BPMS), while retaining many of the unique features that set it apart from the multitude of other BPMS available. Active Endpoints is a venture-backed private vendor that initially produced the standards-based middleware distributed in original equipment manufacturer (OEM) agreements. Active Endpoints focused first on a Business Process Execution Language (BPEL) execution engine and then on ActiveVOS, a feature-rich BPMS.

Figure 6: Active Endpoints BPM radars



Source: Ovum

In terms of product positioning, ActiveVOS is clearly recognisable. The product's development was driven by Active Endpoints' perception of the failings of the contemporary BPMS. In the vendor's opinion, these typically involve either an unwieldy technology stack or the neglect of process execution in favour of business users’ priorities. Instead, Active

Endpoints positions ActiveVOS 7.0 as a comprehensive BPMS, pitched primarily at IT developers working for or closely aligned with line-of-business departments. In Active Endpoints' opinion, it is this development constituency that is best placed to manage business processes and compose service oriented architecture (SOA)-enabled, process-driven applications. In order to cater for such an approach, Active Endpoints insists on three principal points of differentiation: ease of deployment and administration; accessible and efficient process modelling; and support for standards.

Following the technology assessment, Ovum believes ActiveVOS 7.0 delivers on all three fronts. ActiveVOS 7.0 is a lean application, packaged into a single executable that runs on any standard Java application server. Furthermore, the deployment is made easier by straightforward licensing, pricing and maintenance.

The ActiveVOS 7.0 modelling environment, based on the familiar Eclipse platform, is slick and interactive. Several modelling aid features mean that traditional and non-traditional modellers alike can quickly build valid and well-formed models. Instead of the traditional HTML forms, ActiveVOS deploys Ajax-based task clients that interact with WS-HumanTask entities, either through JavaScript Object Notation (JSON) or Simple Object Access Protocol (SOAP) protocols. This means that the task presentation layer can be assembled using a drag-and-drop user interface that offers a pallet of Ajax form design elements and automatically binds task form elements to task services.

As impressive as the modelling and deployment features are, it is the support for standards that sets Active Endpoints apart. In this area, ActiveVOS is clearly a market-leader. Given Active Endpoints' background, this is no surprise. Nonetheless, it is commendable that ActiveVOS was one of the first vendors to support business process modelling notation (BPMN) 2.0. The latest iteration of BPMN is also coupled with the first-class integration with BPEL (an area in which Active Endpoints excelled for a while) and supported by other standards, such as WS-HumanTasks.

Ovum notes that ActiveVOS renders valid BPMN 2.0 at all times, but executes BPEL. The two manifestations of the model, however, are synchronised and the process model is readable in either standard at any point, depending on the demands and the audience served. Moreover, ActiveVOS can deal with BPEL code originating from other runtime engines. In fact, the vendor claims that even extended BPEL code can be rendered in BPMN 2.0, although some interventions may be required. The benefit of such an approach is that ActiveVOS can integrate with, and re-use process artefacts created by, other tools.

Of course, many will point out that BPEL will soon be rendered redundant, given that BPMN 2.0 can be made executable. Active Endpoints, on the other hand, remains convinced that BPEL will remain the principal, as well as fully compliant, execution route for BPMN 2.0. The vendor is also confident that its previous experience with both BPEL and BPMN 2.0 means that its blended BPMN 2.0/BPEL approach will represent a dramatically simpler execution path compared to the native BPMN 2.0 execution.

Ovum believes that this may not be such a risky bet, for two principal reasons. The first is that BPEL execution is now well-understood and adopted, to the point of commoditisation. This is evident both by the groundswell of vendor support for BPEL and the proliferation of open source BPEL engines, including ActiveBPEL project in which Active Endpoints used to play an active role. The second reason is the fact that ActiveVOS aims to deliver simple and efficient BPMS targeted primarily at the developers, rather than process-design specialists. As such, Active Endpoints' principal constituency may be better suited for the BPEL route.

OVUM

Recommendation: Consider

As a relatively recent entrant among the leading BPMS vendors, Active Endpoints' market impact remains limited. For example, Ovum did not manage to gather enough end-user sentiment survey responses to include the vendor in the Core Decision Matrix graph. Nonetheless, solid growth in what was a difficult year placed Active Endpoints among market leaders in the Revenue Growth category. To a certain extent, the situation is understandable, given that the vendor was only established in 2004, releasing a competitive BPMS later still.

Consequently, based primarily on ActiveVOS' technology strengths, Ovum believes Active Endpoints' BPMS ought to be placed in the Consider category. Ovum notes that ActiveVOS 7.0 achieves above-average marks in all but one technology assessment category, while garnering a joint-top score in the important categories such as Standards or Discovery and Scoping. If there is a shortcoming in terms of technology, based on Ovum's assessment, it is in the area of Business Rules.

On balance, Ovum would not hesitate to recommend ActiveVOS 7.0 for any deployment scenario calling for an IT-developer-led, lean and effective BPMS. Although the process modelling environment is outstanding, ActiveVOS' principal target remains line-of-business-aligned IT development teams that are looking to orchestrate processes and develop process-based applications rapidly and efficiently, including reusing or integrating the existing process artefacts.

Active Endpoints retains a strongly horizontal appeal, but the vendor has found considerable success in telecommunications, insurance and the public sector, while maintaining coverage in other industries. ActiveVOS installations can be found in many large enterprises. However, line-of-business-developer focus, easy administration, clear pricing and interoperability make ActiveVOS a particularly suitable option for providing a SOA-enabled BPM platform for individual divisions of multinational corporations.

Overall, Ovum is impressed with Active Endpoints' approach. Although ActiveVOS is very much a proprietary technology product, albeit based on and compliant with the relevant technology standards, Ovum believes that the vendor has learned useful lessons from open source approach, in order to produce powerful, functionally-rich BPMS that is easy to procure, deploy and use. Pitching at the line-of-business level, IT departments may not be to everyone's liking or cater for absolutely every BPM scenario, but it will present ActiveVOS with plenty of opportunities.

These positives aside, there are several shortcomings that Active Endpoints could address. From a marketing perspective, Ovum notes that more could be done to promote the successes of existing ActiveVOS deployments. While it is commendable that Active Endpoints has chosen not to introduce further confusion by promoting its open source ActiveBPEL project, Ovum wonders whether the vendor could benefit from a more proactive open source strategy in the future.

From a technology point of view, support for business rules is a clear gap in Ovum's technology assessment. However, given the very specific strategy that Active Endpoints has adopted, the company's development efforts may well be directed elsewhere. Rather than investing in broadening the reach of process modelling or experimenting with cloud-based deployment models, Ovum believes that the vendor will choose to boost support for its core audience of business-driven IT developers. For instance, future versions of ActiveVOS may well incorporate Services Component Architecture (SCA), which would mean greater insight into the network of service dependencies, and simplify the creation of both BPEL and Java services.

