November 9, 2010

The Forrester Wave™: Comprehensive Integration Solutions, Q4 2010

by Ken Vollmer

for Application Development & Delivery Professionals

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Oracle, IBM, TIBCO Software, And Software AG Lead The Field

by Ken Vollmer
with Mike Gilpin and Sander Rose

EXECUTIVE SUMMARY

Forrester evaluated 15 leading comprehensive integration solution (CIS) vendors against 137 criteria that reflect the requirements of application development and delivery professionals. We found that Oracle, IBM, TIBCO Software, and Software AG lead the pack with the best overall combination of architecture, integration server, application development, business process management (BPM), and business-to-business (B2B) support features. Progress Software, Vitria, SAP, Axway, Microsoft, and SEEBURGER are also Leaders based on the overall strength of their integration solutions. Additionally, Sterling Commerce (IBM), iWay Software, Active Endpoints, inubit, and Microgen all scored as Strong Performers based on their unique strengths in the integration arena.

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NOTES & RESOURCES

Forrester interviewed 15 vendors — Active Endpoints, Axway, IBM, inubit, iWay Software, Microgen, Microsoft, Oracle, Progress Software, SAP, SEEBURGER, Software AG, Sterling Commerce, TIBCO Software, and Vitria — and more than 40 user companies during the evaluation process. In addition, Forrester has spoken with more than 300 clients in the past year about the multitude of integration challenges that they are facing.

Related Research Documents

"The State Of B2B Integration"
July 12, 2010

"The CIS Reference Architecture Model"
April 19, 2010

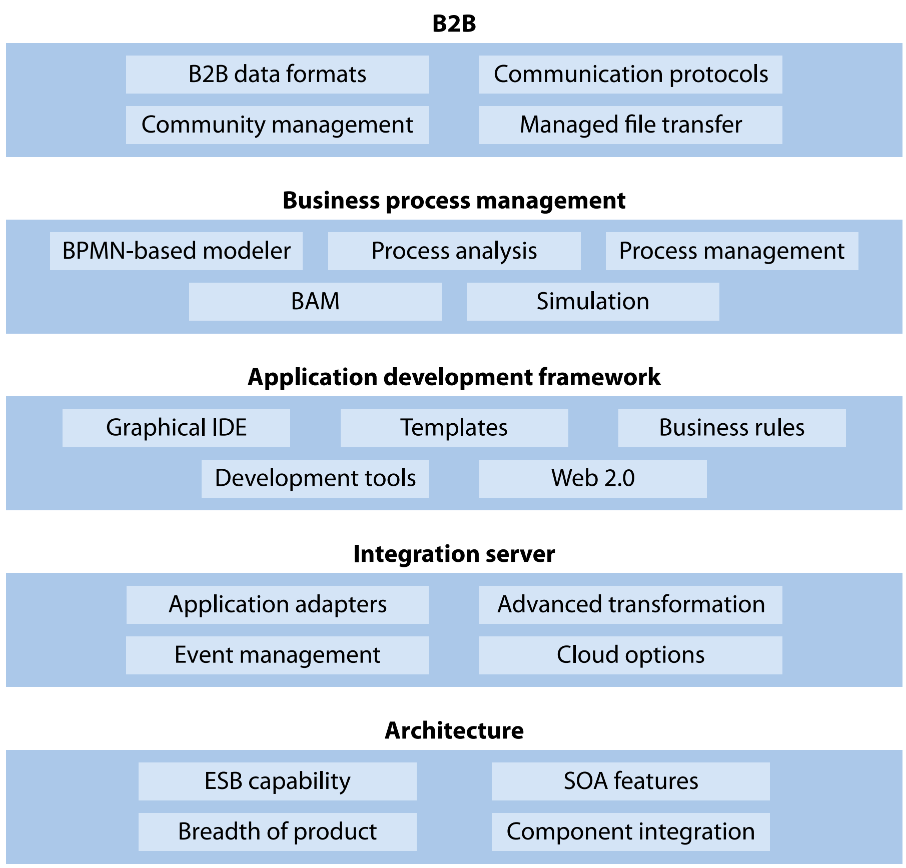
"2010 Update: Evaluating Integration Alternatives"
January 12, 2010

"Create An Enterprise Integration Strategy To Lower Your Costs"
June 12, 2009

CIS TOOLS ARE THE MOST COMPREHENSIVE INTEGRATION PRODUCTS ON THE MARKET

CISes offer the broadest array of capabilities for solving complex integration challenges.[1] They provide enterprise application integration (EAI), business process management (BPM), B2B integration for both electronic data interchange (EDI) and Extensible Markup Language (XML) transactions, model-driven application development (MDD), embedded service-oriented architecture (SOA) capability, and managed file transfer (MFT) features in a preintegrated technology stack from a single vendor. These solutions should be at the top of the shortlist of tools enterprises should consider to support the most complicated integration challenges they face.[2] Forrester has defined the *CIS reference architecture model* to outline the broad range of capabilities included within this type of solution (see Figure 1).

Figure 1 CIS Reference Architecture Model

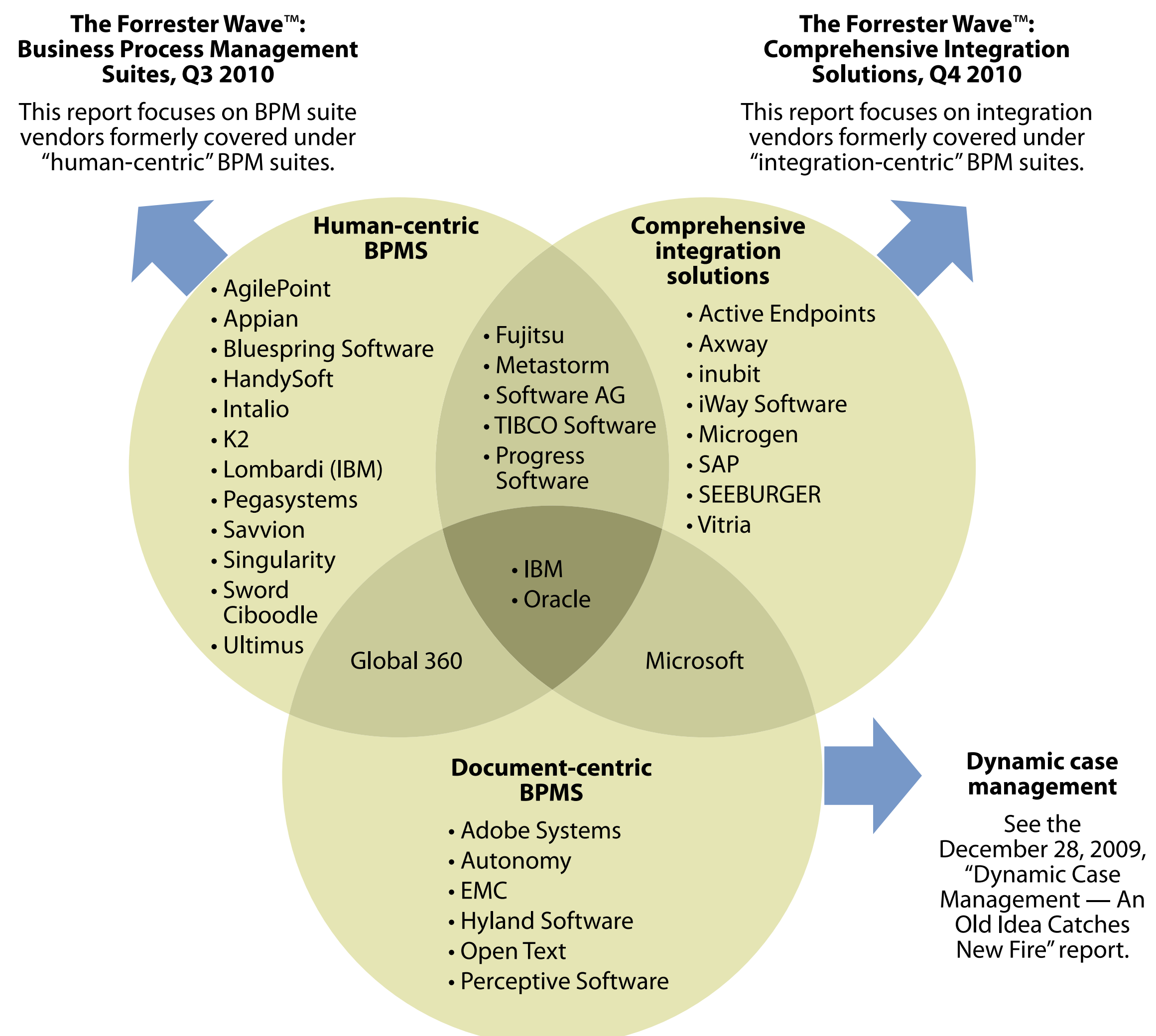


56007 Source: Forrester Research, Inc.

The Link Between CIS Tools And BPM

As the CIS reference architecture model illustrates, BPM is a key component of all CISes. Indeed, the 2006 and 2008 Forrester Wave™ evaluations of this software category referred to this kind of tool as "integration-centric business process management suites."[3] However, due to the continuing expansion of these products' integration functionality, it no longer makes sense to emphasize the products' BPM capability over their other capabilities. Hence, we have changed the name of this category to "comprehensive integration solutions." Nonetheless, application development and delivery professionals should bear in mind that CISes still provide one of the three main types of BPM tools (see Figure 2).[4]

Figure 2 The Three Types Of BPM Suites



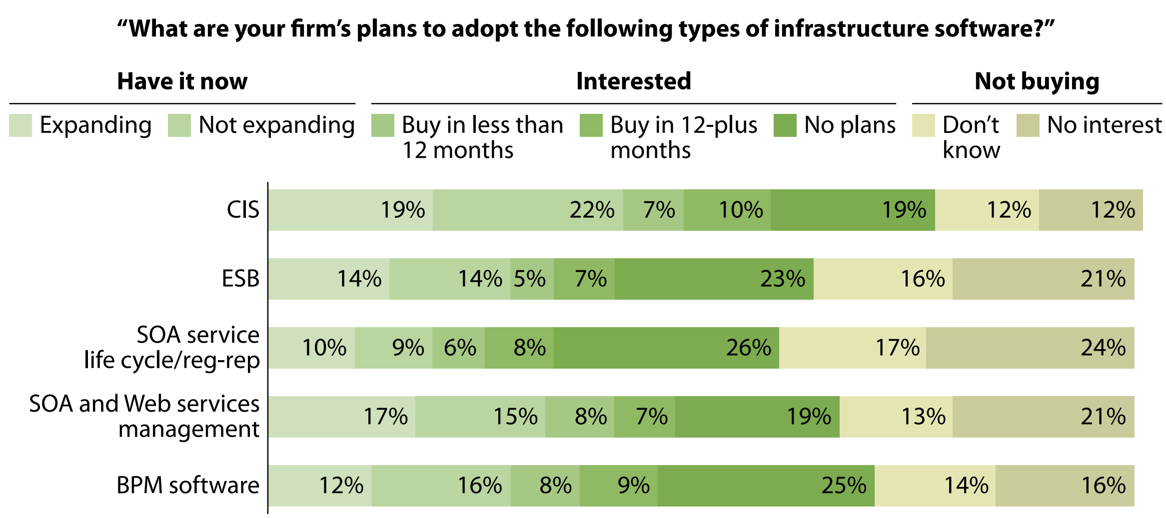
56007 Source: Forrester Research, Inc.

CIS Adoption Leads Other Infrastructure Software Deployments

Forrester fielded its most recent Enterprise And SMB Software Survey, North America and Europe, in Q4 2009. Among other topics, it examined the relative level of deployment of several categories of software. CIS showed the highest adoption level among a range of infrastructure software categories (see Figure 3).

CISes came in first place, with 41% of the 507 respondents indicating that they already have a CIS in place. SOA and Web service management tools came in second in adoption at 32%, followed by a tie between enterprise service buses (ESBs) and standalone BPM tools at 28%, and finally SOA registry/repository solutions at 19%. CIS tools also led with the highest expected level of growth; 19% of the respondents stated that they are expanding their use of CISes. This compares with 17% of respondents reporting that they are increasing their use of SOA and Web services management tools.

Figure 3 CIS Products Lead Infrastructure Tools Adoption



Base: 507 decision-makers at North American and European enterprises
(percentages may not total 100 because of rounding)

Source: Enterprise And SMB Software Survey, North America And Europe, Q4 2009

56007 Source: Forrester Research, Inc.

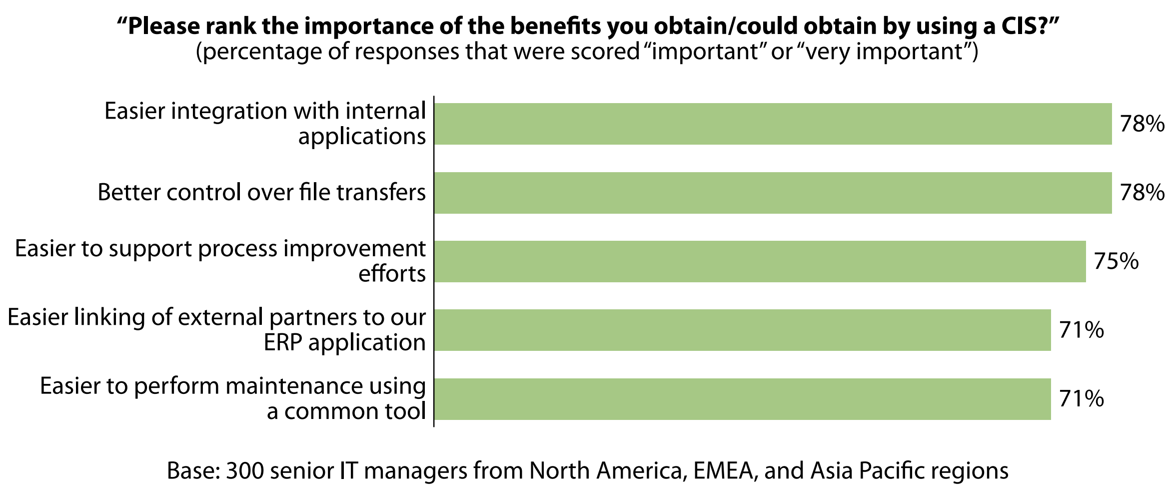
The Benefits Of CIS Tools Explain Their High Demand

Forrester conducted the December 2009 Global EDI/B2B Online Survey, a separate global survey of 300 senior IT managers, to explore key integration trends and identify the factors driving the high demand for CISes (see Figure 4).

While the benefits of a CIS solution vary depending on an enterprise's size and the complexity level of its integration challenges, respondents identified several common benefits, including:

- **Easier integration with internal applications.** This response highlights the ability of a CIS to support integration among internal applications, including both commercial and homegrown applications.
- **Better control over file transfers.** CIS vendors have moved quickly to add managed file transfer capability over the past 18 months. This is in response to increased enterprise concerns over potential vulnerabilities associated with uncontrolled file transfers.[5]
- **Better support for process improvement efforts.** The BPM features embedded in a CIS enable developers to incorporate model-driven process management directly into their application development efforts.[6]
- **Easier linking of external partners to an enterprise resource planning (ERP) application.** A CIS offers many features to support effective B2B exchanges, including support for both EDI and XML-based messages, extensive data transformation support, and built-in support for a wide range of communication protocols.
- **Easier maintenance using common integration tools.** Acquiring a CIS from a single vendor can bring significant savings in infrastructure tool maintenance, especially during periodic upgrades. In the case of a CIS, the vendor assumes all responsibility for ensuring that the individual components work as expected; as opposed to a best-of-breed situation in which the enterprise assumes responsibility for testing, with CIS, product upgrades obtained from multiple vendors actually work together.

Figure 4 Multiple Benefits Drive Demand For A CIS



Source: December 2009 Global EDI/B2B Online Survey

56007 Source: Forrester Research, Inc.

CIS Use Is Strong Across All Regions, Sectors, And Enterprise Size Categories

The December 2009 survey delved deeper into the issue of CIS adoption by asking respondents to indicate whether they use a comprehensive integration solution for their internal integration needs (see Figure 5).

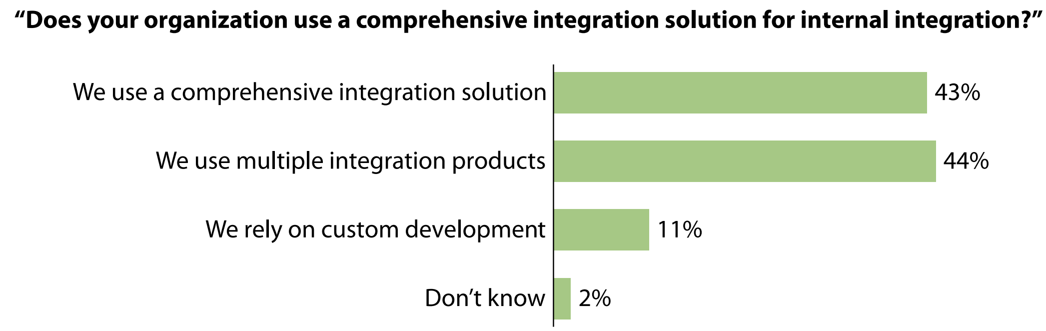
Of the respondents, 43% indicated that they are currently using a CIS for their integration needs, while 44% indicated that they are using multiple integration tools, and 11% reported that they rely on custom integration development. These usage levels were consistent across different geographic regions, enterprise sizes, and industry categories. Furthermore, of those using a CIS, 91% of respondents indicated that they are using it to support their B2B requirements (see Figure 6).

These high levels of CIS tool usage reflect enterprises' preference to consolidate their integration infrastructure on a comprehensive set of features that comes preintegrated from a single vendor. This simplifies integration challenges and reduces the enterprise's ongoing maintenance challenges.

For example, consider a situation that requires the receipt of inbound electronic payments that need to be accurately and quickly applied to the proper accounts inside the enterprise ERP system. Using a CIS would enable one infrastructure stack to handle automated receipt of the EDI-based electronic payment from the bank, transformation of the information into the applicable internal message formats, and automated allocation of the appropriate funds to the proper ERP accounts. Another example might entail a specific business event triggering the automatic collection of key business information from various internal applications. The tool would then transform the data into the required data formats and securely transmit it to key business partners using the MFT component.

During their evolution from early EAI tools of more than 10 years ago, CIS providers have pursued continuous expansion of product functionality and ease of use, resulting in highly productive environments for supporting integration-related development efforts. This is one of the key reasons why CISes have achieved mainstream status, and it's also why enterprises should consider adopting a CIS a best practice in most situations.

Figure 5 CIS Tool Adoption For Internal Integration

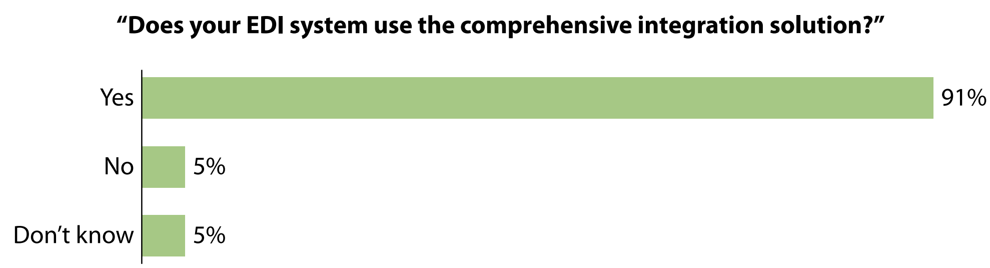


Base: 300 senior IT managers from North America, EMEA, and Asia Pacific regions

Source: December 2009 Global EDI/B2B Online Survey

56007 Source: Forrester Research, Inc.

Figure 6 Most Organizations That Have A CIS Use It For B2B Integration



Base: 128 senior IT managers from North America, EMEA, and Asia Pacific regions who indicated that their organization has a CIS
(percentages do not total 100 because of rounding)

Source: December 2009 Global EDI/B2B Online Survey

56007 Source: Forrester Research, Inc.

COMPREHENSIVE INTEGRATION SOLUTIONS EVALUATION OVERVIEW

To determine the state of the CIS market and compare how vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top CIS vendors that are capable of meeting a wide range of enterprise integration needs.

Buyers Focus On Comprehensive Integration Functionality

After reviewing past product evaluations, client inquiries, and vendor interviews, we developed a comprehensive set of evaluation questions. We evaluated vendors against 137 criteria, which we grouped into three high-level buckets:

- **Current offering.** We looked at the breadth of each vendor's product offering across 110 criteria, including architecture, integration server, application development framework, business process management, and B2B support.

- **Strategy.** We looked at the strength of each vendor's strategy across 15 criteria, including product strategy, solution cost, strategic alliances, and customer reference checks.

- **Market presence.** To evaluate each vendor's penetration in the current CIS market, we evaluated 12 criteria, including installed base, new customers, and delivery footprint.

The Evaluated Vendors Support A Broad Range Of Integration Capabilities

Forrester evaluated 15 CIS vendors, including Active Endpoints, Axway, IBM, inubit, iWay Software, Microgen, Microsoft, Oracle, Progress Software, SAP, SEEBURGER, Software AG, Sterling Commerce (IBM), TIBCO Software, and Vitria. Each of these vendors has (see Figure 7):

- **Extensive integration features.** All evaluated products offer features including integrated support for EAI and process integration (BPM). Most of the offerings also include extensive features for supporting XML-based and EDI-based B2B integration.

- **Embedded SOA support.** Each of these products has an embedded ESB or strong ESB features. Many also provide built-in registry/repository functionality to aid in the effective creation and management of application services.

- **Standard-based support for model-driven application development.** The evaluated vendors provide support for MDD based on the following standards: BPMN, BPEL, JBI, SCA, and OSGI. This enables the creation of integration-related applications that require little to no manual coding.

- **A CIS suite that was available in the marketplace as of July 1, 2010.** Each vendor also had to provide reference customers who are actively using the product.

Figure 7 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product(s) evaluated	Version release date range
Active Endpoints	ActiveVOS v7.1.2	May 2010
Axway	Axway Synchrony Platform v4.3	May 2010
IBM	IBM WebSphere Dynamic Process Edition (WDPE) v7	December 2009
inubit	inubit BPM-Suite v5.3	March 2010
iWay Software	iWay Service Manager rel 5.5 SP1 iWay Trading Partner Manager iWay CEP Enable	March 2007 June 2005 June 2009
Microgen	Microgen Aptitude v3.0	May 2010
Microsoft	BizTalk Server 2010 & ESB Toolkit	Q3 2010
Oracle	Oracle SOA Suite 11g R1 Oracle BPM Suite 11g R1	April 2010
Progress Software	Progress Integration Suite	May 2010
SAP	SAP NetWeaver v7.1	July 2009
SEEBURGER	Business Integration Server v6.3.4 Business Integration Server B2B Gateway v6.3.4	June 2010
Software AG	webMethods v8 ARIS product suite v7.1	December 2009 April 2008
Sterling Commerce	Sterling Integrator (SI) v5.0	April 2009
TIBCO Software	ActiveMatrix BusinessWorks v5.8 ActiveMatrix BPM v3.0	January 2010 May 2010
Vitria	Vitria M_3O Suite v3	June 2009

Vendor selection criteria
The product meets Forrester's definition of a CIS and as such provides capabilities for supporting enterprise application integration (EAI), B2B integration (B2Bi), business process management (BPM), model-driven application development (MDD), and service-oriented architecture (SOA).
The vendor has been determined to be one of the leading providers of CIS technology and has significant market share in this space or has gained significant mindshare via the capabilities of its products.
The product version has been released and was available in the marketplace (with reference customers) prior to July 1, 2010.

Source: Forrester Research, Inc.

THE FORRESTER CIS EVALUATION INDICATES THAT THE TOP VENDORS ARE STABLE

The evaluation found a market that is still led by major software providers (see Figure 8):

- **Oracle, IBM, TIBCO Software, and Software AG continue to dominate the CIS market.** With comprehensive offerings and solid customer references, these four vendors have led this market in the past four Forrester Wave evaluations of this category (2005, 2006, 2008, and 2010). This continued leadership highlights the emphasis that these four vendors have placed on improving their integration software solutions' functionality.

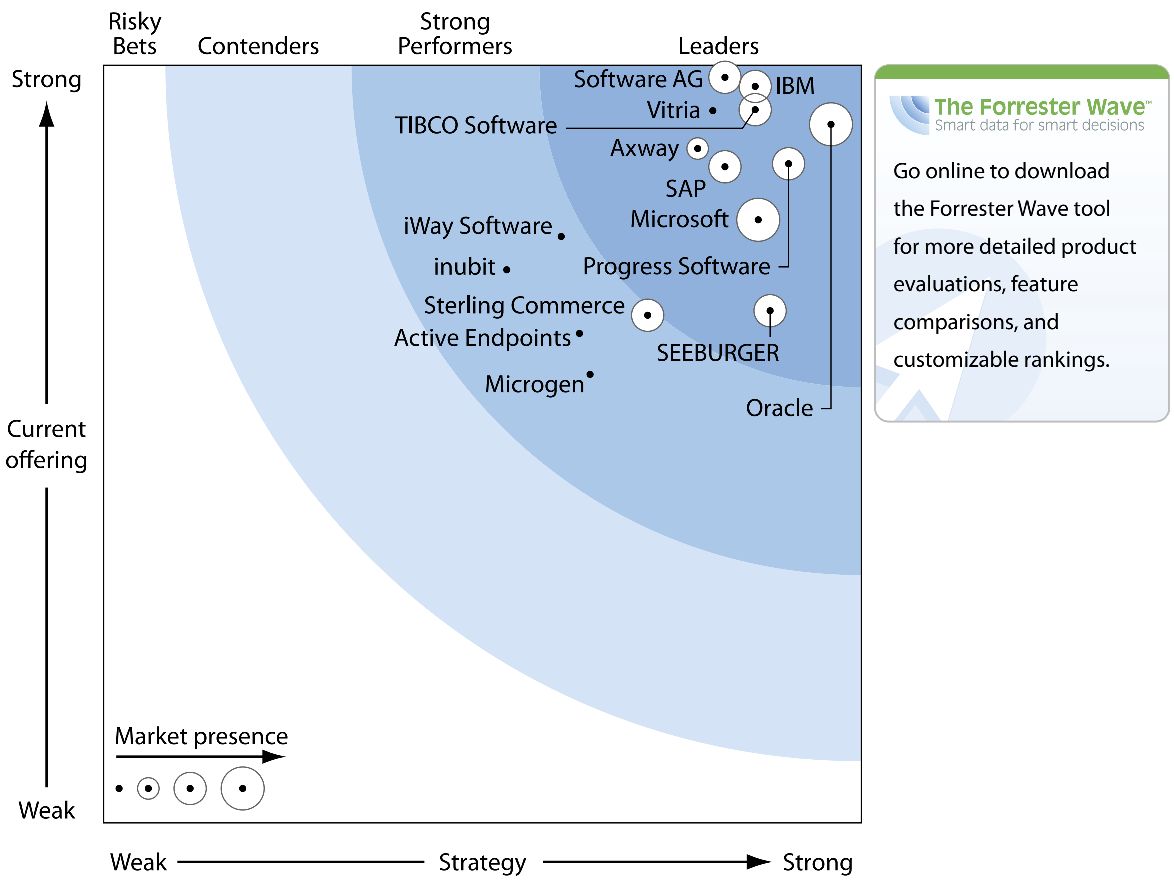
- **Progress Software, Vitria, SAP, Axway, Microsoft, and SEEBURGER are Leaders.** Each of these vendors scored well in all areas of the evaluation. Progress Software, Axway, and SEEBURGER are first-time vendors in this integration suite Forrester Wave.

- **Sterling Commerce (IBM) and iWay Software were Strong Performers.** Sterling Commerce has a long history of supporting B2B integration, while iWay Software has a solid general-purpose integration suite.

- **Active Endpoints, inubit, and Microgen were Strong Performers as well.** This is the first appearance for each of these vendors in this evaluation, and each of them is particularly strong in providing a comprehensive, model-driven application development environment.

This evaluation of CIS tools is intended to be a starting point only. We encourage readers to view detailed product evaluations and adapt the criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.

Figure 8 Forrester Wave™: Comprehensive Integration Solutions, Q4 '10



Source: Forrester Research, Inc.

Figure 8 Forrester Wave™: Comprehensive Integration Solutions, Q4 '10 (Cont.)

	Forrester's Weighting	Active Endpoints	Axway	IBM	inubit	iWay Software	Microgen	Microsoft	Oracle
CURRENT OFFERING	50%	3.23	4.45	4.86	3.65	3.87	2.96	3.98	4.61
CIS product details	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Availability date	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Architecture	20%	3.94	3.94	4.85	4.00	3.61	2.98	3.63	4.85
Integration server	30%	3.76	4.60	4.88	3.32	4.36	2.86	4.64	4.68
Application development framework	10%	4.45	4.10	4.80	4.60	3.75	4.45	4.55	4.90
Business process management	20%	4.22	4.42	5.00	4.58	2.60	3.92	3.48	4.88
B2B support	20%	0.12	4.92	4.71	2.41	4.71	1.38	3.56	3.86
STRATEGY	50%	3.14	3.92	4.30	2.66	3.02	3.21	4.32	4.80
Product strategy	40%	2.60	4.30	5.00	3.20	3.30	2.15	3.30	5.00
Solution cost	10%	1.00	3.00	3.00	1.00	3.00	1.00	5.00	3.00
Strategic alliances	25%	3.00	4.60	5.00	2.10	4.60	4.00	5.00	5.00
Customer reference checks	25%	5.00	3.00	3.00	3.00	1.00	5.00	5.00	5.00
MARKET PRESENCE	0%	1.06	2.43	3.35	0.83	1.16	0.02	4.71	4.44
Installed base	80%	1.00	2.30	3.00	0.70	1.00	0.00	4.70	4.30
New customers	10%	2.00	2.50	4.50	1.50	1.00	0.00	4.50	5.00
Delivery footprint	10%	0.60	3.40	5.00	1.20	2.60	0.20	5.00	5.00

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

Figure 8 Forrester Wave™: Comprehensive Integration Solutions, Q4 '10 (Cont.)

	Forrester's Weighting	Progress Software	SAP	SEEBURGER	Software AG	Sterling Commerce	TIBCO Software	Vitria
CURRENT OFFERING	50%	4.35	4.33	3.38	4.92	3.35	4.74	4.70
CIS product details	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Availability date	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Architecture	20%	4.74	4.85	3.31	4.94	3.55	4.94	4.88
Integration server	30%	4.68	4.40	3.12	4.84	3.32	5.00	4.76
Application development framework	10%	4.70	4.60	3.20	4.80	2.70	4.65	5.00
Business process management	20%	4.90	4.52	2.84	5.00	2.28	4.60	4.90
B2B support	20%	2.76	3.36	4.46	5.00	4.60	4.34	4.10
STRATEGY	50%	4.52	4.10	4.40	4.10	3.59	4.30	4.02
Product strategy	40%	4.30	4.00	4.75	5.00	2.85	5.00	4.30
Solution cost	10%	3.00	5.00	1.00	1.00	1.00	3.00	3.00
Strategic alliances	25%	5.00	5.00	4.60	5.00	4.40	5.00	4.00
Customer reference checks	25%	5.00	3.00	5.00	3.00	5.00	3.00	4.00
MARKET PRESENCE	0%	3.47	3.59	3.06	3.24	3.27	3.41	0.14
Installed base	80%	3.30	3.30	3.00	3.00	3.30	3.30	0.00
New customers	10%	4.50	4.50	4.00	5.00	4.50	3.50	0.00
Delivery footprint	10%	3.80	5.00	2.60	3.40	1.80	4.20	1.40

All scores are based on a scale of 0 (weak) to 5 (strong).

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders Provide A Range Of Integration Features With Strong Support For Development

- **Oracle delivers a well-integrated CIS solution.** Oracle has been identified as a Leader. The Oracle solution, which enables rapid development of integration-related functionality, includes Oracle SOA Suite and Oracle BPM Suite as its key components. The vendor has the second-largest base of CIS customers (approximately 6,000) and has consistently achieved leadership status in this software category over the past five years. Oracle achieved very strong scores in four out of five product evaluation areas (architecture, integration server, application development framework, and business process management) and achieved an above-average score for its B2B features.

- **IBM provides leading-edge integration tools with improved integration of key components.** IBM is another long-time Leader in the integration software space and has achieved an improved score in this evaluation due to its efforts to provide higher levels of integration among its core integration products (WebSphere Process Server, WebSphere Business Modeler, and WebSphere Business Monitor). IBM had very strong scores in all five product-offering evaluation areas (architecture, integration server, application development framework, business process management, and B2B support). IBM also recently acquired Sterling Commerce, which will enable it to create significantly greater functionality for its current and future B2B customers.[7]

- **TIBCO Software's CIS provides strong SOA, BPM, and application development features.** TIBCO Software's ActiveMatrix Platform combines the features of TIBCO ActiveMatrix BusinessWorks with TIBCO ActiveMatrix BPM (a near-total rewrite of its BPM solution obtained via the acquisition of Staffware in 2004). TIBCO Software also recently acquired the Proginet MFT solutions, which it will be incorporating into the BusinessWorks solution set.

- **Software AG provides comprehensive application and process integration features.** In addition, it offers a strong application development framework. Software AG is another frequent member of the Leaders group, having achieved that status in each of the previous three evaluations. The vendor's acquisition of the ARIS platform from IDS Scheer during the past year has significantly improved its already strong features in the area of BPM to the point that it is also considered a Leader in the human-centric BPM space.[8] In addition, Software AG also provides strong B2B integration features and a solid application development environment that includes the leading-edge CentraSite registry/repository product.

- **Progress Software enters the CIS market for the first time.** Progress is no newcomer to the integration space; it has provided one of the leading ESB solutions (Sonic) for some time. This year, the vendor has combined the Sonic ESB with Progress Actional (SOA management), Progress Apama (complex event processing), and the strong BPM capability it obtained via the acquisition of Savvion earlier this year into what it calls the Progress Integration Suite. This has enabled the vendor to score well across all areas of this evaluation.

- **Vitria provides a visually rich, Web-based integration and development platform.** Vitria's M_3O product is a treat for the eyes and particularly easy to use due to its intuitive Web-based design environment and represents a significant leap forward from traditional J2EE-based application development integrated development environments (IDEs). While one of the smaller vendors, Vitria has consistently demonstrated the leading-edge capability of its integration and development tooling.

- **SAP makes ongoing advances in its integration capability.** SAP has been criticized in the past for its somewhat limited integration features, but the vendor has made progress to the point where the current release of NetWeaver PI is meeting many of the integration needs of many of its customers. We have spoken with several clients using NetWeaver for their core integration capability; many speak highly of the product, while others have highlighted lingering deficiencies in the area of support for complex integration in heterogeneous environments. SAP has the third-largest installed base of CIS customers (4,400-plus) and has achieved leadership status for the past two years.

- **Axway leverages its strong B2B background to offer a solid CIS.** Axway has been a leader in providing B2B integration solutions (including strong support for MFT needs) for several years and has years of experience in application integration. It has now broadened its product portfolio to include strong BPMN-based modeling, application development, integration server, and process integration features.

- **Microsoft's BizTalk continues to mature.** BizTalk 2010 provides above-average capability in the areas of architecture, integration-centric BPM, and B2B and achieved top-level scores in the areas of integration server and application development support. Microsoft has also enhanced the level of ESB functionality BizTalk provides, and this product represents a good choice for meeting the integration needs of many Microsoft shops. Microsoft has the largest base of CIS clients of any of the vendors in this evaluation: more than 9,000 BizTalk customers (though many of them use the product only for B2B).

- **SEEBURGER also leverages a strong B2B story to offer a more comprehensive suite.** SEEBURGER has a long-term relationship with SAP for supporting EDI document exchange. Over the past couple years, SEEBURGER has added new functionality to build out a more comprehensive integration environment and has subsequently obtained a position in the Leaders group of this evaluation. It achieved above-average scores in the architecture, integration server, and application development sections, below-average scores for its support for BPM, and very strong scores in the B2B section of this evaluation.

The Strong Performers All Offer Strong Model-Driven Application Development Features

The vendors in this group all provide solid integration and application development capabilities, but most lack features in at least one of the other core areas of the evaluation.

- **Sterling Commerce will take its strong B2B heritage to IBM.** Sterling Commerce has been a leading provider of B2B technology and services for more than 25 years and now brings this expertise into the IBM integration product line. A product road map for the combined Sterling Commerce and IBM portfolio of integration products has recently been announced.[9] Sterling Commerce achieved its Strong Performer score in this evaluation due to the features provided by the Sterling Integrator product, which has undergone significant enhancements over the past five years.

- **iWay Software leverages its leading role in the adapter space.** iWay is a longtime vendor of technology and application adapters that are OEMed by many other integration vendors. More recently, it has developed a solid integration server (iWay Service Manager), an event processing engine (iWay CEP Enable), a good suite of B2B tools, an MFT product, and extract, transform, and load (ETL) functionality. However, this vendor has limitations in the area of support for BPM.

- **Active Endpoints builds on its foundational BPEL capability.** This vendor has risen quickly over the past three years from a supplier of BPEL solutions to a vendor that now provides a leading-edge application development environment with strong support for SOA and BPM. This vendor is a low-cost choice for application development due to its unique go-to-market strategy, which is based on direct customer downloads and remote support. This vendor provides limited support for traditional B2B integration.

- **Inubit provides a strong application development environment.** inubit is a German software firm that has created a comprehensive application development solution with strong BPM and SOA capabilities that cover all aspects of process improvement deployments. Its offering is particularly strong in the areas of BPM methodology support and governance. The vendor targets midsize firms and has achieved significant adoption levels in Europe. This vendor's product suite has somewhat limited support for B2B.

- **Microgen focuses on BPM-based financial applications.** Microgen is a UK-based software firm that has developed several targeted offerings that support enterprise-level financial requirements. The vendor's foundational product is Microgen Aptitude, which contains strong support for application integration, BPM, business rules, data management, SOA, and model-driven application development. This vendor provides limited support for B2B integration.

SUPPLEMENTAL MATERIAL

Online Resource

The online version of Figure 8 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Data Sources Used In This Forrester Wave

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Product demos.** We asked vendors to conduct demonstrations of their product's functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

- **Customer reference calls.** To validate product and vendor qualifications, Forrester also conducted reference calls with two of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

Survey Methodology

Forrester's Enterprise And SMB Software Survey, North America And Europe, Q4 2009, was fielded to 2,165 IT executives and technology decision-makers located in Canada, France, Germany, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's suite of Business Data Services studies. Forrester fielded the survey from September 2009 to November 2009. LinkedIn fielded this survey online on behalf of Forrester. Survey respondent incentives included gift certificates and research summaries. We have provided exact sample sizes in this report on a question-by question basis.

Forrester's Business Data Services fields eight business-to-business technology studies in 19 countries each calendar year. For quality control, we carefully screen respondents according to job title and function. Business Data Services ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of IT products and services. Additionally, quotas are set for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts.

In addition to sampling error, one should bear in mind that the practical difficulties in conducting surveys can introduce error or bias into the findings of opinion polls. Other possible sources of error in polls are probably more serious than theoretical calculations of sampling error. These other potential sources of error include question wording, question ordering, and nonresponse. As with all survey research, it is impossible to quantify the errors that may result from these factors without an experimental control group, so we strongly caution against using the words "margin of error" in reporting any survey data.

These statements conform to the principles of disclosure of the National Council on Public Polls.

We have illustrated only a portion of survey results in this document. For access to the full data results, please contact bds@forrester.com.

Forrester fielded its December 2009 Global EDI/B2B Online Survey to 300 senior IT managers from a partner research panel. The respondents were responsible for the EDI/B2B document exchange programs at small, medium, and large enterprises. Only one response was allowed per enterprise, and responses from professional services firms were not included. Only a portion of the survey results are illustrated in this document.

Forrester fielded the survey during November and December 2009.

ENDNOTES

1 For an overview of CIS capabilities, see the April 19, 2010, "The CIS Reference Architecture Model" report.

2 For a comparison of CIS capability compared with other integration tools, refer to Figure 1: Comparing Features By Integration Product Category. See the January 12, 2010, "2010 Update: Evaluating Integration Alternatives" report.

3 Forrester evaluated vendors offering integration-centric business process management suites in both 2006 and 2008. See the December 20, 2006, "The Forrester Wave™: Integration-Centric Business Process Management Suites, Q4 2006" report, and see the October 6, 2008, "The Forrester Wave™: Integration-Centric Business Process Management Suites, Q4, 2008" report.

4 For a detailed discussion of the different types of BPM tools, see the September 4, 2009, "The Importance Of Matching BPM Tools To The Process" report.

5 For a discussion on the increased enterprise focus on MFT solutions, see the August 3, 2010, "TIBCO's Plan To Acquire Proginet Highlights The Growing Importance Of Managed File Transfer" report.

[6] The BPM capability provided in CISes has evolved significantly over the past few years and in many cases rivals what were originally called "BPM pure-play" solutions. However, the BPM features in CISes are best suited for integration-centric BPM scenarios that involve complex integration. For a more extensive discussion of the main BPM types, see the September 4, 2009, "The Importance Of Matching BPM Tools To The Process" report.

[7] Forrester published a report discussing the implications of IBM's acquisition of Sterling Commerce. The deal closed on August 27, 2010. See the June 2, 2010, "IBM To Acquire Sterling Commerce" report.

[8] For details on Forrester's evaluation of Software AG's human-centric BPM features, see the August 24, 2010, "The Forrester Wave™: Business Process Management Suites, Q3 2010" report.

[9] For details regarding how IBM intends to meld the IBM and Sterling Commerce B2B integration products, see the October 20, 2010, "The IBM B2B Integration Solutions Strategy" report.

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