

January 7, 2009

The Forrester Wave™: Business Process Analysis, EA Tools, And IT Planning, Q1 2009

by Henry Peyret
for Enterprise Architecture Professionals



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IDS Scheer, Casewise, MEGA, Metastorm, And Troux Technologies Lead The EA Tools Category

by **Henry Peyret**

with Gene Leganza, Katie Smillie, and Mimi An

EXECUTIVE SUMMARY

In this second release of Forrester's assessment of enterprise architecture and business process analysis (BPA) tools, Forrester assessed nine leading vendors in a 93-criteria evaluation. We found that IDS Scheer, Casewise, MEGA, Metastorm, and Troux Technologies lead the pack for general EA tool usage. For the more specific IT planning usage category, these Leaders are joined by the most powerful vendor in this specific category: alfabet. The Leaders are followed by IBM, a Strong Performer in all three categories; iGrafx, a Strong Performer in the business process analysis category and the general EA category; and Sybase, a Contender in all three categories.

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Forrester conducted product evaluations in August 2008 and interviewed 9 vendors: alfabet, Casewise, IDS Scheer, iGrafx, MEGA, Metastorm, Sybase, IBM (formerly Telelogic), Troux Technologies, and 17 user companies.

Related Research Documents

["Use The Right Set Of Criteria When Selecting An Enterprise Architecture Tool"](#)
October 24, 2008

["Best Practices For Choosing EA Tools"](#)
June 12, 2007

["The Forrester Wave™: Enterprise Architecture Tools, Q2 2007"](#)
April 25, 2007

EA TOOLS MAKE THE ARCHITECT — AND OTHER STAKEHOLDERS — MORE PRODUCTIVE

Enterprise architecture (EA) tools collect models and artifacts to describe the enterprise and the IT landscape. In addition, they provide analysis and simulation capabilities, significantly helping enterprise architects — and numerous other EA stakeholders — collaborate to make better and faster decisions about enterprise transformations and evaluate these transformations' impact on future IT systems.

The first generation of EA tools emerged more than 20 years ago when the earliest vendors merged data modeling with repository functionality to allow several modelers to work together. Then tools in this category broadened their scope with process modeling and other additional models and artifacts, including application, network, strategy, and organization models. The consequence of this scope increase was that enterprise architects started to involve additional EA stakeholders — developers, database administrators (DBAs), project managers, and business analysts, to name a few — to contribute the artifacts for which they were responsible. To accelerate the adoption of EA tools by these other EA stakeholders, the vendors in this space set out to add value by developing business process (BP) simulation, analysis capabilities, requirements management, and, in some cases, code or data model generation.

The current generation of EA tools is introducing another new category of functionality: features for planning IT changes such as consolidation of data centers, rationalization of applications worldwide, or an IT merger after an acquisition.

As a consequence, the number of EA stakeholders potentially using EA tools is growing again to include business analysts, quality or risk auditors, IT strategists, CIOs, project portfolio managers, and others. The previous Forrester Wave™ assessing EA tools revealed more than 35 different roles in large enterprises that EA tools can serve.¹

And this trend of increasing the number of roles using EA tools will continue as business units in the enterprise more and more see IT as a key factor in innovation — meaning that the IT organization will no longer be the only decision-maker involved in choosing IT investments. The trend's impact to the EA tools market? EA tools are becoming collaboration platforms that help organizations improve decisions about major business and IT changes. The current transition period should reinforce EA tools' cross-cutting role by facilitating better impact analysis by using the multidimensional dependencies that EA tools collect.

BPA, EA, And IT Planning Tools Represent The Present Marketplace

However, this new role of EA tools as enterprisewide, role-crossing tools is just beginning to evolve, and neither the market nor the products have fully matured in this respect. Tool buyers will often focus on the third generation of EA tools, looking for a unified EA management product — and fail because the converged perfect tool for anyone does not yet exist.² Or, customers who do not need to

address all topics with the same product will choose to focus on a single issue. To accommodate this approach, Forrester assessed the nine vendors in this Wave using three separate weightings for the assessment criteria. These sets of weightings recognize that:

- **Business analysts want business process analysis features.** When business analysts are looking to describe business processes, the dedicated best-of-breed business process analysis tools are not sufficient. Why? Because the dedicated tools are often limited: They do not connect the highest-perspective view — which looks at business drivers, objectives, and metrics — to workflows and the organizational changes needed to improve operational productivity within a context of increasing constraints and regulatory controls. And they do not link to representations of IT systems. So business analysts turn to EA tools that include BPA features and provide details within a broader context.
- **Enterprise architects choose standard EA tool features for centralizing models.** Enterprise architects ask for the features weighted in this set when they want to consolidate all artifacts into a single repository to obtain an exhaustive view of the enterprise model landscape.
- **IT strategists choose IT planning capabilities for faster and better planning changes.** It is difficult for IT strategists in large enterprises to make the right decisions at the right times. Engaging and coordinating the many stakeholders needed in decisions to launch major change initiatives can be troublesome, particularly in industries or countries where a consensus approach is the norm. IT strategists of every stripe, including enterprise architects, prefer products that help them plan and synchronize the high-impact initiatives.

EA TOOLS EVALUATION OVERVIEW

To assess the state of the EA tools market and see how the vendors stack up against one another, Forrester evaluated the strengths and weaknesses of nine top EA tools vendors.

Our Evaluation Criteria Emphasize A Broad Range Of EA Stakeholder Requirements

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 93 criteria, which we grouped into three high-level buckets:

- **Current offering.** We conducted an in-depth evaluation of the six components of EA tools: modeling, analysis and simulation, life-cycle management, publishing and reporting, templates, and product architecture.
- **Strategy.** We assessed product strategy, solution cost (weighted at zero in the assessment), strategic alliances, and corporate strategy.

- **Market presence.** We chose market presence criteria to reflect the vendors' installed base for the solution delivery footprint: the ability to implement products and support customers globally; revenues, including license versus service revenue; and revenue growth. This last criterion, which regards tools in the IT planning category, is of particular interest, as there are relatively few new vendors in that area that are growing faster than the veteran vendors. Forrester also assessed vendor-provided customer references.

We Assessed Nine Leading Vendors On BPA, EA, And IT Planning Capabilities

Forrester invited 10 vendors for this assessment: alfabet, Casewise, IBM, IDS Scheer, iGrafx, MEGA, Metastorm, Sybase, Telelogic, and Troux Technologies (see Figure 1). IBM declined to participate in this Wave with its WS Process Modeler due to a repositioning of the product following IBM's purchase of Telelogic. (Since IBM has purchased Telelogic and now owns its portfolio of projects, Telelogic will be noted as IBM in this evaluation). Sybase is positioning PowerDesigner as its entry for EA modeling, replacing Embarcadero in this Wave after that company went private and refocused on its core capabilities. Each of the vendors included in our evaluation has:

- **Enterprise architecture capabilities.** The product must provide broad metamodel capabilities and support several EA frameworks for enterprise architects to recognize it as a potential tool.
- **Either revenues of at least \$20 million or a fast-growing revenue stream.** As the market is growing and maturing with some merger activity, this is a criterion we've added since our last EA tools Wave.
- **A delivery footprint that can handle worldwide demand.** There are other vendors in the \$20 million range, such as BOC Group, that are available only in Europe; therefore, these vendors did not qualify for this Wave.

Figure 1 Evaluated Vendors: Product Information And Selection Criteria

Vendor	Product evaluated	Version release date range
alfabet	planningIT v 4.0	April 2008
Casewise	Corporate Modeler V.10.3SR4, CAM-Portal 2007.2 sr3	July 2007 - December 2007
IBM (formerly Telelogic)	Telelogic System Architect V11.1, Telelogic System Architect/Publisher v11.1, Telelogic SA/XT v11.1 GA, Telelogic Six Sigma dedicated offer v10.0, Telelogic System Architect/Process Integrator v11.1, Telelogic System Architect/Simulator v11.1, Telelogic System Architect For SOA v11.0, Telelogic Change v5.0 , Telelogic TAU 4.1, Telelogic System Architect ERP v10.0	June 2006 - July 2008
IDS Scheer	ARIS Business Architect/ARIS Business Designer 7.1, ARIS IT Architect 7.1, ARIS Business Rule Designer 7.1, ARIS Business Optimizer 7.1, ARIS Business Simulator 7.1, ARIS UML Designer 7.1, ARIS IT Inventory 7.0.2, ARIS Business Publisher 7.1, ARIS SOA Architect 7.1, ARIS SixSigma 7.1, ARIS Performance Dashboard 4.1, ARIS Process Event Monitor 1.0, ARIS Process Performance Manager 4.1, ARIS Value Pack for Release Cycle Management 1.0	July 2007- July 2008
iGrafx	iGrafx 2007 includes iGrafx Process for Six Sigma, iGrafx Process Central, iGrafx Enterprise Central, iGrafx Enterprise Modeler, iGrafx IDEF0, iGrafx BPEL, iGrafx Viewer	March 2007
MEGA	MEGA Suite 2007 includes MEGA Process, MEGA Simulation, MEGA SolMan (SAP), MEGA Architecture, MEGA Designer, MEGA Business Data, MEGA ITSM Accelerator, MEGA EA Accelerator for TOGAF, MEGA eTOM Accelerator, MEGA Supervisor, MEGA Exchange, MEGA Publisher, MEGA Studio, MEGA Advisor, MEGA IT Planning	September 2007 - June 2008
Metastorm	Metastorm ProVision® v 6.1 (client), Metastorm Knowledge Exchange v 6.1 (server), Metastorm Discovery, Metastorm BPM Designer	March 2008 - July 2008
Sybase	PowerDesigner 12.5, PowerDesigner 15.0 (as future reference only). Version 15 is not assessed in the present Wave.	V. 12. 5 - July 2007 V. 15 - Oct 2008
Troux Technologies	Troux Enterprise Suite, version 7.1, includes Troux Transformation Platform, Troux Applications, Troux Standards, Troux eaGov	December 2007

Source: Forrester Research, Inc.

Figure 1 Evaluated Vendors: Product Information And Selection Criteria (Cont.)

Vendor selection criteria
The product must provide broad metamodel capabilities and support several EA frameworks to be recognized by enterprise architects as a potential tool.
The vendor has either revenues of at least \$20 million or a fast-growing revenue stream.
The product version has been released and is generally available prior to August 1, 2008.

Source: Forrester Research, Inc.

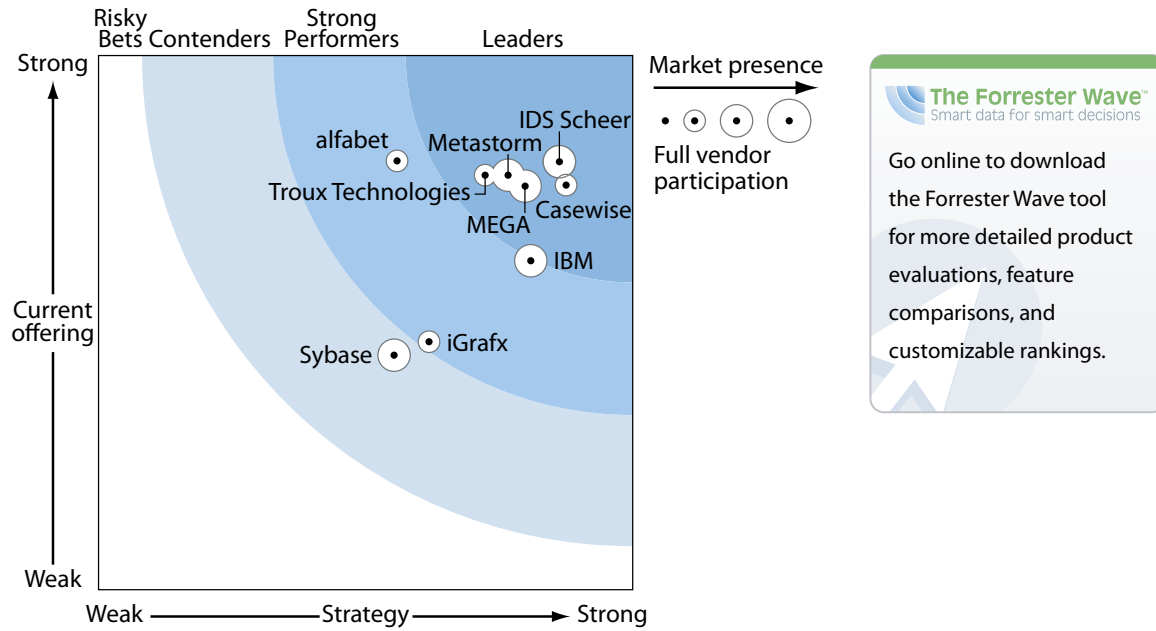
NO ONE PRODUCT IS PERFECT FOR EVERY USAGE

The evaluation uncovered a market in which (see Figure 2, see Figure 3, and see Figure 4):

- **Casewise, IDS Scheer, MEGA, Metastorm, and Troux are Leaders for general EA tool usage.** The differences between leading tools features in the general EA tools category are decreasing. Casewise, IDS Scheer, MEGA, and Metastorm are particularly close in capabilities. Troux scores in the Leader category but is more focused on the IT side.
- **Casewise, IDS Scheer, and Metastorm are Leaders for BPA usage.** Those seeking business process analysis capabilities should also consider MEGA, particularly if requirements include performing quality and risk auditing in parallel.
- **alfabet and Troux are clear Leaders for the IT-planning-specific requirements.** But some of the other Leaders in the general category — particularly MEGA and Metastorm — are not far behind. You may also consider other leading general-usage vendors such as Casewise and IDS Scheer for IT planning, but these vendors have a limited feature set addressing that usage.
- **IBM is a Strong Performer in the three categories.** Telelogic System Architect should benefit from IBM's recent purchase, but only time will tell if IBM will be able to deliver all the promised features on the new Jazz platform at the right pace in a competitive landscape.
- **iGrafx is a Strong Performer in the BPA and EA tools categories.** iGrafx's solution's usability eases non-EA specialists into the EA world. If you want to involve business-area analysts in your EA initiative, iGrafx is a particularly good fit.
- **Sybase remains a Contender in every category.** We did not evaluate PowerDesigner version 15 because that version was not generally available at the time of our assessment. The newer version should satisfy enterprise architects better than the version evaluated in this Wave, particularly if your requirements focus on data and process models.

This evaluation of the EA tools market 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 2 Forrester Wave™: EA Tools, Q1 '09



Source: Forrester Research, Inc.

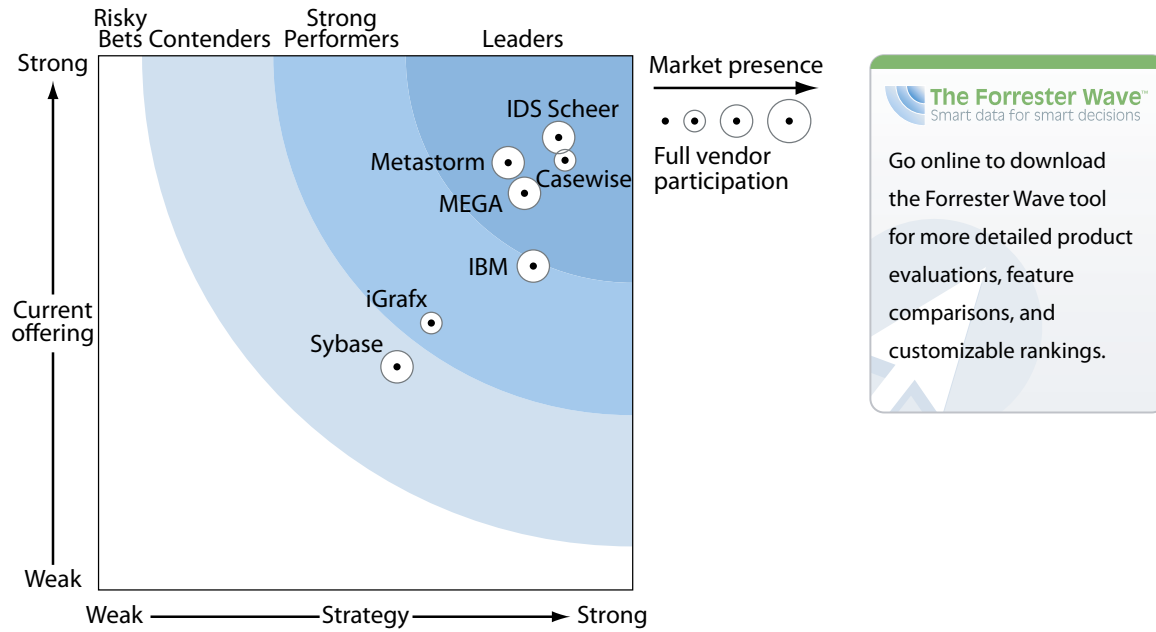
Figure 2 Forrester Wave™: EA Tools, Q1 '09 (Cont.)

	Forrester's Weighting	alfabet	Casewise	IBM	IDS Scheer	iGrafx	MEGA	Metastorm	Sybase	Troux Technologies
CURRENT OFFERING	50%	3.99	3.76	3.11	3.99	2.31	3.76	3.86	2.17	3.86
Modeling	20%	4.61	4.13	3.93	4.79	3.07	4.54	4.26	2.64	4.51
Analysis and simulation	20%	2.60	2.60	1.80	3.40	2.00	3.60	3.00	0.60	2.20
Life-cycle management	20%	4.25	2.69	2.70	2.84	1.56	3.80	3.67	1.72	4.43
Publishing and reporting	15%	5.00	4.50	4.50	4.00	3.00	3.50	4.50	3.00	5.00
Templates	10%	2.60	5.00	3.40	4.60	1.40	2.60	4.00	1.40	2.40
Product architecture	15%	4.60	4.70	2.70	4.80	2.60	3.90	4.00	3.90	4.30
STRATEGY	50%	2.80	4.37	4.07	4.31	3.10	3.99	3.84	2.80	3.62
Product strategy	40%	4.00	4.40	3.20	3.80	2.20	4.20	3.60	1.60	3.80
Solution cost	0%	3.00	4.00	2.75	3.50	2.25	2.75	2.75	0.75	2.00
Strategic alliances	30%	1.60	3.70	4.30	5.00	5.00	3.00	4.30	3.70	4.30
Corporate strategy	30%	2.40	5.00	5.00	4.30	2.40	4.70	3.70	3.50	2.70
MARKET PRESENCE	0%	2.97	2.98	3.70	3.92	2.81	3.34	3.31	3.26	2.90
Installed base	30%	1.75	3.25	3.50	4.00	3.00	3.50	3.00	3.75	1.25
Customer references	20%	3.00	1.00	3.00	3.00	2.00	2.00	3.00	2.00	5.00
Revenues	15%	3.00	3.00	4.00	5.00	2.00	4.00	4.00	4.00	3.00
License versus service	5%	5.00	5.00	5.00	5.00	5.00	3.00	5.00	1.00	5.00
Revenue growth	10%	5.00	3.00	2.00	2.00	2.00	3.00	2.00	2.00	3.00
Delivery footprint	20%	3.20	4.00	5.00	4.60	3.80	4.20	3.80	4.40	2.60

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

Source: Forrester Research, Inc.

Figure 3 Forrester Wave™: Business Process Analysis, Q1 '09



Source: Forrester Research, Inc.

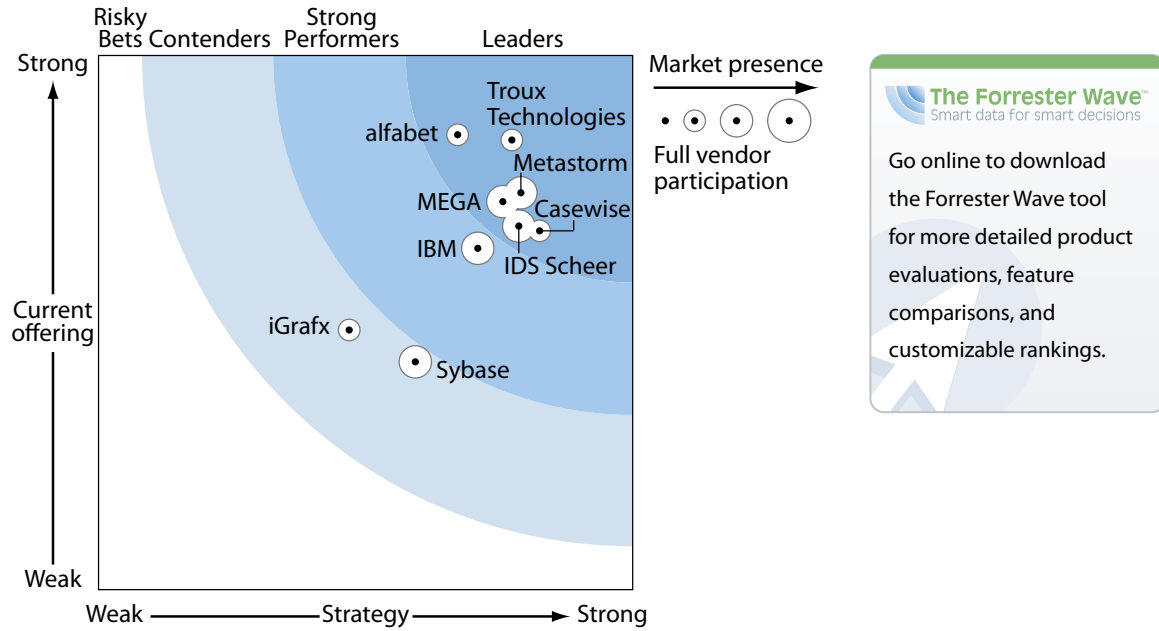
Figure 3 Forrester Wave™: Business Process Analysis, Q1 '09 (Cont.)

	Forrester's Weighting	Casewise	IBM	IDS Scheer	iGrafX	MEGA	Metastorm	Sybase
CURRENT OFFERING	50%	4.01	3.04	4.21	2.48	3.68	3.97	2.05
Modeling	20%	4.38	3.88	4.90	3.20	4.63	4.30	2.70
Analysis and simulation	20%	2.55	1.85	3.40	2.05	3.90	3.20	0.70
Life-cycle management	15%	3.38	3.01	3.89	1.77	4.10	3.98	1.94
Publishing and reporting	20%	4.50	4.50	4.00	3.00	3.50	4.50	3.00
Templates	15%	5.00	1.80	4.60	2.00	1.80	3.80	0.60
Product architecture	10%	4.70	2.70	4.80	2.60	3.90	4.00	3.90
STRATEGY	50%	4.37	4.07	4.31	3.10	3.99	3.84	2.80
Product strategy	40%	4.40	3.20	3.80	2.20	4.20	3.60	1.60
Solution cost	0%	4.00	2.75	3.50	2.25	2.75	2.75	0.75
Strategic alliances	30%	3.70	4.30	5.00	5.00	3.00	4.30	3.70
Corporate strategy	30%	5.00	5.00	4.30	2.40	4.70	3.70	3.50
MARKET PRESENCE	0%	2.98	3.70	3.92	2.81	3.34	3.31	3.26
Installed base	30%	3.25	3.50	4.00	3.00	3.50	3.00	3.75
Customer references	20%	1.00	3.00	3.00	2.00	2.00	3.00	2.00
Revenues	15%	3.00	4.00	5.00	2.00	4.00	4.00	4.00
License versus service	5%	5.00	5.00	5.00	5.00	3.00	5.00	1.00
Revenue growth	10%	3.00	2.00	2.00	2.00	3.00	2.00	2.00
Delivery footprint	20%	4.00	5.00	4.60	3.80	4.20	3.80	4.40

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

Source: Forrester Research, Inc.

Figure 4 Forrester Wave™: IT Planning, Q1 '09



Source: Forrester Research, Inc.

Figure 4 Forrester Wave™: IT Planning, Q1 '09 (Cont.)

	Forrester's Weighting	alfabet	Casewise	IBM	IDS Scheer	iGrafx	MEGA	Metastorm	Sybase	Troux Technologies
CURRENT OFFERING	50%	4.25	3.34	3.19	3.40	2.40	3.61	3.70	2.07	4.20
Modeling	10%	4.76	4.32	3.98	4.86	3.34	4.58	4.40	2.90	4.58
Analysis and simulation	20%	3.00	2.50	2.25	3.00	2.25	3.25	2.50	0.75	2.50
Life-cycle management	35%	4.13	2.34	2.46	2.51	1.66	3.60	3.46	1.53	4.35
Publishing and reporting	30%	5.00	4.50	4.50	4.00	3.00	3.50	4.50	3.00	5.00
Templates	0%	2.60	5.00	3.40	4.60	1.40	2.60	4.00	1.40	2.40
Product architecture	5%	4.60	4.70	2.70	4.80	2.60	3.90	4.00	3.90	4.30
STRATEGY	50%	3.46	4.12	3.54	3.90	2.32	3.82	4.00	3.10	3.92
Product strategy	60%	4.40	4.00	2.80	3.40	1.40	3.80	4.00	2.80	4.20
Solution cost	0%	3.00	4.00	2.75	3.50	2.25	2.75	2.75	0.75	2.00
Strategic alliances	20%	1.70	3.60	4.30	5.00	5.00	3.00	4.30	3.60	4.30
Corporate strategy	20%	2.40	5.00	5.00	4.30	2.40	4.70	3.70	3.50	2.70
MARKET PRESENCE	0%	2.97	2.98	3.70	3.92	2.59	3.34	3.31	3.26	2.90
Installed base	30%	1.75	3.25	3.50	4.00	2.25	3.50	3.00	3.75	1.25
Customer references	20%	3.00	1.00	3.00	3.00	2.00	2.00	3.00	2.00	5.00
Revenues	15%	3.00	3.00	4.00	5.00	2.00	4.00	4.00	4.00	3.00
License versus service	5%	5.00	5.00	5.00	5.00	5.00	3.00	5.00	1.00	5.00
Revenue growth	10%	5.00	3.00	2.00	2.00	2.00	3.00	2.00	2.00	3.00
Delivery footprint	20%	3.20	4.00	5.00	4.60	3.80	4.20	3.80	4.40	2.60

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

Source: Forrester Research, Inc.

VENDOR PROFILES

Leaders: IDS Scheer, Casewise, MEGA, Metastorm, alfabet, And Troux Technologies

- IDS Scheer ARIS.** IDS Scheer has long been an undisputed Leader in the business process analysis category. While it also entered the EA tools market as a Leader, its competitors improved their products' capabilities, and now IDS Scheer is in direct competition with Casewise, MEGA, and Metastorm in both categories. Although its product's existing features make IDS Scheer a Leader in the IT planning category as well, the vendor needs to enhance life-cycle management support to successfully compete against alfabet and Troux, the higher-scoring Leaders of the IT planning category. IDS Scheer's product strategy, particularly regarding BP execution and EA management, lacks clarity. Good partnership alliances continue to contribute to its position as a Leader.

- **Casewise Corporate Modeler.** Casewise provides a very strong product for business process analysis and general EA tool usage. Casewise leads the pack of IDS Scheer competitors, and its solution often competes head-to-head with ARIS regarding product features; Casewise has a clearer product strategy than IDS Scheer. In a point-to-point comparison, only its market presence remains average, a factor mitigated by our reference interviews. Casewise's product lacks some life-cycle management capabilities to compete in the IT planning category against alfabet's and Troux's best-of-breed products.
- **MEGA Suite.** MEGA is a Leader in all categories with a very homogeneous product. Thanks to the MEGA Advisor, MEGA has one of the most impressive set of predefined and customizable real-time dashboards, which makes its solution one of the leading offerings in analysis and simulation. The MEGA suite also has good life-cycle management capabilities that put MEGA in a good position to compete against alfabet and Troux in the up-and-coming IT planning category. MEGA has good market presence but will now begin to face competition from some of its past partners, such as IBM.
- **Metastorm ProVision and Knowledge Exchange.** Metastorm is a Leader in the BPA and EA tools categories. Metastorm should be able to compete against the IT planning category Leaders if it develops further life-cycle management capabilities based on the Metastorm BPM platform.
- **alfabet PlanningIT.** alfabet is a Leader in the IT planning category, earning top scores for product capabilities, and a Strong Performer in the EA tools category. alfabet is clearly a thought leader in the IT planning category and should be on the shortlist of anyone looking for an EA tool. alfabet is a particularly good fit for large companies with cultures that require a consensus for IT decisions driven by structured workflows. However, it did not score as a Leader in the EA tools category mainly because of its weakness in partnerships, which gave it a lower strategy score. While Forrester believes that strong partnerships will drive success in the EA tool market, alfabet feels that its open approach to integration mitigates the need for such partnerships and that its rapid success in the marketplace shows that it could be on the right trajectory. PlanningIT is not represented in the BP analysis category because its product is missing BP simulation and BAM capabilities.
- **Troux Technologies Enterprise Suite.** During the last two years, Troux has done impressive work on its product and strategy after a period lacking in direction following its acquisition of the Metis business from Computas. It is now a Leader in the EA tools category thanks to a clear strategy and numerous partnerships on the service delivery side, as well as application partnerships. It is not assessed in the BPA category, as its product lacks simulation capabilities. Troux is a thought leader in the IT planning category, providing pragmatic applications focused on major IT changes. Troux's Enterprise Suite fits particularly well for large companies with unstructured approaches to decision-making. Troux shipped version 8 of its suite in December — a major release that added a number of new capabilities in the areas of EA and IT planning.

Strong Performers: IBM And iGrafx

- **IBM's Telelogic System Architect.** System Architect has long been a Leader for the BPA and EA tools categories. Telelogic System Architect has good publishing and reporting capabilities and good EA template support. Telelogic System Architect fits particularly well for companies that want to focus on standards and that have a low number of concurrent users for classic EA tools and BP analysis features. By focusing on addressing the developer as the most important EA stakeholder and prioritizing integration with Telelogic's (now IBM's) other products (TAU, Doors, and Change), Telelogic System Architect fell behind in the other, more-strategic areas such as analysis/simulation and life-cycle management. Telelogic SA has an old architecture coupled with several product add-ons (including Change for EA Governance) — which should improve in upcoming years through the new Rational platform (the Jazz initiative). If you are an IBM shop, Telelogic should be part of your short list.
- **iGrafx Enterprise Modeler.** iGrafx is a long-time player in the business process analysis market that is particularly suitable for organizations with growing requirements. iGrafx products do not require a huge infrastructure deployment; organizations can start with drawing tools (Flowcharter) then move smoothly to more powerful tools. The largest enterprises can continue on to a repository and advanced simulation capabilities. The usability features (copy/paste, a Microsoft-Office-type user interface, etc.) make it the preferred tool when you want to involve business users not familiar with EA verbiage and concepts.

Contender: Sybase

- **Sybase PowerDesigner.** Sybase is a relatively new entrant in the EA tools space. The company evolved its product from its data modeling background by extending its metamodel and including support for EA frameworks. This Wave assessed version 12.5 of PowerDesigner, as the new version 15 was not in production at the time of our assessment. If your EA work is mainly around the enterprise data model, you can consider Sybase PowerDesigner as a potential first step as an EA tool.

SUPPLEMENTAL MATERIAL

Online Resource

The online versions of Figure 2, Figure 3, and Figure 4 are Excel-based vendor comparison tools that provide 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 demonstrations.** 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.

ENDNOTES

- ¹ The previous EA tools Wave assessed 10 vendors including Adaptive, Agilense, alfabet, Casewise, Embarcadero, IDS Scheer, MEGA International, Proforma, Telelogic, and Troux. See the April 25, 2007, "[The Forrester Wave™: Enterprise Architecture Tools, Q2 2007](#)" report.
- ² Most enterprise architects are still using criteria such as price, ease of use, or metamodel customization to differentiate enterprise architecture (EA) tools. While these criteria are useful, they are not the ones that will help you show the real value of EA tools for your enterprise. See the October 24, 2008, "[Use The Right Set Of Criteria When Selecting An Enterprise Architecture Tool](#)" report.

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