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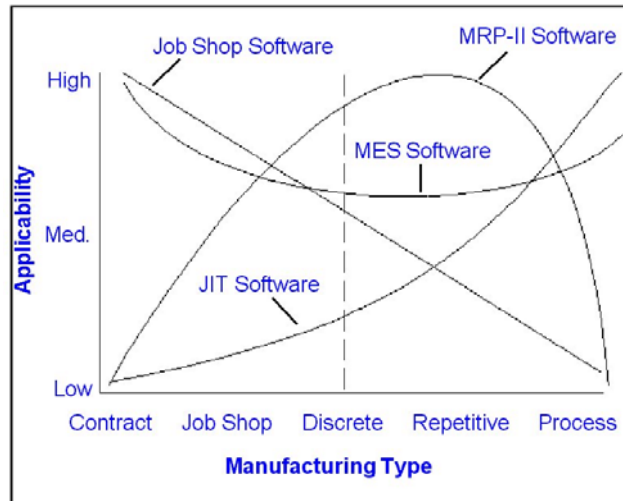
PWR's ENTERPRISE MISSION CRITICAL SOFTWARE REVIEW AND FORECAST 2005 ©

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For 2004 and Forecasts 2005-7



This chart demonstrates the applicability of various ERP types across the various styles of manufacturing.



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PROLOG

ADVICE FOR 2006:

“Do not wait for ideal conditions and circumstances as they will never come...nor will the best opportunities”
Bill McSpadden

In 2006 The Focus Will Be the Growth of the Enterprise

This year's mission critical software industry annual review and forecast is our best ever. It contains information on over 300 companies and their offerings. We selected over 100 to profile and review. We discuss trends, issues and results.

I am struck by the fact that today's Enterprise-level Business Solutions are not only non-interoperable, but they do not meet the challenges of globalization. IMTI (Interactive Manufacturing Technology Initiative) is an exciting nonprofit consortium of leading industry U.S. manufacturers working together to solve this and other mutual challenging technology and management issues in the areas of advanced technology and business management. As a member of the board of advisors of the (IMTI) organization, In the most recent consortium activities we have been engaged in, we are struggling to solve very difficult issues such as developing solutions to serious managerial and mission control problems including developing competitive interoperability solutions to multi enterprise collaboration issues. With tongue in cheek, as your raconteur and anecdote expert at Plant-Wide Research, I have often said it is important for software vendors to begin to recognize their manufacturing management's R&D focus must turn away from single company and factory issues. Software solutions in that area are a well-beaten path. Today's R&D emphasis must be on supporting growth at the full enterprise level.

That is, the corporate focus of our members is no longer backward or inward looking with respect to gaining company profitability but rather, realistically meeting the challenge of globalization especially in the manufacturing sector. Multi enterprise collaboration is now exceptionally important in a global economy; even in the SME (small to medium enterprise) mission critical software market. Software developers must stop and smell the real world roses. They need to take a position of supporting a full enterprise view of resolving competitive solutions and that includes not only the customer, but the supply chain and all services partners as well. Services partners include, but are not limited to, insurance, regulatory, legal, and all enterprise stakeholders. Interoperability in this area is of growing importance. Never mind all the hype promoting agility -- agility is impossible without multi-enterprise collaboration. Businesses in the 21st Century is not “knocking on the door of opportunity” but demanding immediate attention. So how can IT and business managers meet the need for interoperability between all stakeholders in a multiple enterprises environment?

The Model Based Enterprise – Simulation and model-based technologies are becoming essential tools of the IT department's and management trade. The dynamic modeling of business processes will enable the operation of agile supply chains that quickly recognize and respond to opportunities and challenges. Model-based collaboration will overcome many of today's barriers between primes, suppliers, customers, regulatory agencies, and other stakeholders. Smaller manufacturers will collaborate as virtual "specialty departments" for multiple primes simultaneously, without the cost and complexity of today's infrastructures. Model-based product and process definition will support seamless operation of technical and business functions at the lowest level of the supply network.

IMTI's leading manufacturers' business systems will gain a global competitive advantage when their system interface directly with those of customers, suppliers and services partners. On-line capability models will accurately "mirror" manufacturing capabilities and equipment, including up-to-date performance, availability, and capacity information. This will allow designers and procurement teams to quickly evaluate potential partners' ability to support production requirements. Model-based work processes will enable engineers, planners, and managers at all levels of the supply chain to collaborate in virtual environments to optimize designs and plans for performance, reliability, cost, schedule, and other factors. All product and process design data and supporting information will be accessible by authorized users anywhere in the world, eliminating the time, cost, and complexity of data management bring the enterprise into synchronization and enable the basis for a true agile enterprise,

Steps To Success:

1. Collaboration Methods & Standards:
 - Develop top-level process dynamic models for all business and technical interactions.
 - Map existing applications supporting these functions to the model.
 - Identify requirements and gaps.
 - Define and develop required methods and standards.
2. Integration Pilot:
 - Dynamic simulation strategies must be tested and focused.
 - Demonstrate effectiveness of the full model-based supply chain collaboration methods and tools.
 - Document and define requirements for further development.
3. Promote Lean Thinking and Establish a Continuous Improvement Program.

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REVIEW AND FORECAST 2005©

TABLE OF CONTENTS

Chapter One

Introduction	10
Manufacturing, Heart and Soul of the U.S. Economy	11
Historically Speaking	13
Challenges and Opportunities	14
What Will The CIO Look For In ERP In 2006	14
Six Rules to win in a Global Market	15
Supply Management Figures	17
Outsourcing	19
Global Marketplace	20
The Global Corporation	21
Manufacturing tools Technology and Automation	21
Sustaining and Disruptive Technology	22
The Meaning of Agility	23
Competing Successfully in 2010	24
A Study: Size Does Matter	26

Chapter Two

Manufacturing and Enterprise Resource Planning Industry	29
IT and ERP Spending Overview (All Verticals)	29
A Historical Look At PWR ERP Forecasts	30
IT Spending Directions In 2001-2005	31
ERP Revenue Review and Forecast 2002-2008 Chart 1	31
Direction of Change In IT Budgets 2004-5 Chart 2	33
IT Spending Overview 2005 Chart 3	33
Top Ten ERP Firms By Revenue (Billions) Chart 4	34
Business Acquisitions and New Products (in brief)	34
Size of the Mission Critical Software Industry Chart 5	34

Chapter Three

Notable Mergers and Acquisitions By Eleven ERP Firms	39
SSA Global	
Exact NA	
Sage	
Oracle	

Lawson
Epicor
Glovia
CDC
Infor
SAP AG
Oracle

Chapter Four

Why Are There So Many Solutions	48
More Than 200 ERP Companies with Multiple Solutions	48
Comments In Brief	48
Configuring An ERP System For A Single (Chart 5)	50
Comments by type of ERP Software	50

Chapter Five

The Software 500 – A Broader Look	53
2004 Software 500 Overview	54
Growth in Segments	54
Fastest Growing	54
Financial Applications	55
Vertical Industry Application	55
Business Process Management (BPM)	56

Chapter Six

What Lies Ahead	58
21st Century Manufacturing and ERP Redux	58
The ERP Market by Tiers	58
Small Businesses Today – Still Behind the Curve	60
Commentary: The Notion of ERP Sales Tiers	61
SME Market Summary	64
Sage/Best Software	
SAP AG	
Microsoft Business Solutions (MBS)	

Chapter Seven

The Big Three Comparison	70
SAP versus Oracle	70
About SAP	
About Oracle	
SAP/Oracle in Tier One – Market Dynamics	72
SAP in 2004 – Key Facts 2004	73

Highlights – 3rd Quarter 2005	74
Operating/Net Income	75
Outlook 2006/7	76
Facts about Oracle – 2004	78
Key Facts	78
Financial Highlights-by fiscal Period	78
The War With SAP	79
Oracle Fusion Middleware	79
More Acquisitions	80
The Siebel Acquisition	80
Free Software	80
New CFO	81
Q3-05 Financials	81
Oracle Fusion Middleware	83
Fusion’s Evolution	84
Microsoft Business Solutions	84
Key Facts	84
Microsoft Highlights	84
Executives Concerned	85
Microsoft Introduces Product Name Change	87
Merging Productivity and Business Systems	87
Microsoft Releases 'Green' Version of Solomon	88
Positioning MBS	89
Chapter Eight	
How the Top Fifty Fared in the Mission Critical	91
Software Industry in 2004 (10M+)	91
AMR’s Report Findings and Analysis	91
Top 50 by Revenue (PWR)	92
2004 License Revenue by ARC	94
10 T2 Selected ERP Vendor Event Reviews	94
Chapter Nine	
19 Smaller and/or Lesser Known Players	103
7 Australian Vendors	111
Chapter Ten	
Customer Relationship Management Vendors	114
Siebel	
Front Range Solutions	
Microsoft CRM	

Salesforce.com	
Top 13 ISM CRM Enterprise Winners	118
Top 15 CRM SME Winners	118
Chapter Eleven	
Major Supply Chain Management Vendors	121
SAP – SCM	
mySAP	
i2 Technology	
Manugistics	
Oracle	
SSA Global	
31 - Lesser Known SCM Companies	123
12 - eSCM Companies	127
Chapter Twelve	
Will 2006 Be A Continuation of 2005?	131
The Economy by Segment Since 1987	131
U.S. Spending on IT Expected to Rise Modestly in 2006	132
ERP New License Sales Versus Services Revenue	132
A Continuation of Trends	133
Chapter Thirteen	
What Were The New Emerging ERP Technologies in 2005?	136
mySAP	
SAP Netweaver	
IBM Web Sphere	
Oracle Fusion Middleware	
Oracle’s Evolution Project	
Technology Platform Adoption and Direction	138
Technology Platform Adoption By Vendor	138
Service Oriented Architecture	138
Grid Computing	139
The “New” Data Center	139
Virtualization	140
RFID	140
Application Service Provider (ASP)	141
Chapter Fourteen	
Will Manufacturers Have Solid Growth Prospects In 2006?	143

ISM Manufacturing Business Survey Committee Report	144
Top 30 Vertical Market Served By The Mission Critical	145
Positioning ISM's Analysis	149
The Productivity Curve	150
Manufacturing Growth in 2004	151
Chapter Fifteen	
Our Annual Review and Forecast For 2006-2007	153
Software	153
Manufacturing	155
5 Key Applications 2004	156
5 Key Applications 2005	157
Appendix One - ERP Software for Linux	160
Appendix Two - ERP Check List	164
Appendix Three - ERP Functional Considerations	169
Appendix Four - ERP Technical Evaluation	170

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