The Forrester Wave™: Enterprise Architecture Management Suites, Q2 2017

Vendor EA Capability Is Increasing, But Stakeholder Experience Is An Issue

by Gordon Barnett
June 14, 2017

Why Read This Report

In our 40-criteria evaluation of enterprise architecture management suite (EAMS) providers, we identified the 10 most significant ones — Avolution, BiZZdesign, BOC Group, Dragon1, Future Tech Systems, MEGA, Planview, Orbus Software, Software AG, and UNICOM — and researched, analyzed, and scored them. This report shows how each provider measures up and helps enterprise architecture (EA) professionals make the right choice.

Key Takeaways

BOC Group, Avolution, Software AG, BiZZdesign, And Planview Lead The Pack

Forrester's research uncovered a market in which BOC Group, Avolution, Software AG, BiZZdesign, and Planview lead the pack. Dragon1, MEGA, Orbus Software, and UNICOM offer competitive options, and Future Tech Systems is a strong player as well.

EA Pros Look For Stronger Visualization And Improved Ease Of Use

The EAMS market is shifting because more EA pros see collaboration with subject matter experts as a way to address their firms' top challenges. EA pros are challenging EAMS providers to deliver capabilities that enable a better experience for both EA and non-EA pros.

Engagement, Analysis, And Communication Are Key Differentiators

As EA frameworks, methods, and techniques stabilize, traditional differentiation across EAMSes has declined. Today, improved stakeholder engagement, portfolio, strategic analysis, and communication dictate which providers will lead the pack. Vendors that can provide a better experience for end users, real-time analysis, and personalized communication position themselves to successfully deliver value to EA pros and their stakeholders.

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by Gordon Barnett
with Alex Cullen, Madeline King, and Sam Bartlett
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Forrester Research, Inc., 60 Acorn Park Drive, Cambridge, MA 02140 USA
+1 617-613-6000 | Fax: +1 617-613-5000 | forrester.com

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Firms Need An EA Practice That Does More Than Modeling

EA professionals have matured their methods and frameworks over more than two decades. For most, the starting point was modeling the technology landscape to identify cost efficiencies. However, as firms start their digital transformation journeys — with the need for the architecture to support customer centricity, become insights-driven, deliver faster value to market, and enable connected stakeholders — an increasing demand for EA services has arisen. Without appropriate tooling that supports broader capabilities than just modeling and without enabling effective interactions with the wider EA community, EA professionals will struggle to meet the demand.

The Scope And Interactions For EA Are Changing

Over the last 24 months, EA leaders have been realigning their services to meet the ever-changing needs of their stakeholders. The demand for architecture guidance has resulted in EA pros repositioning their teams to cover a broader scope (with less involvement in individual projects) and utilizing an EA community of stakeholders with more of a business focus and less of a technology focus. Underlying this shift are a few trends:

› **IT asset management and strategy execution are driving EA demand.** The scope of EA continues to evolve as firms experience the value that it can bring. A recent Forrester survey of EA pros reflects the scope changes of EA. It showed that the primary drivers for EA had moved from focusing on purely technology landscape modeling to a mix of supporting tech management and enabling execution of business strategy (see Figure 1).[1]

› **Digital experience strategies are creating broader EA interactions.** EA leaders have reacted to the constraints of limited resources by building EA communities or ecosystems to develop and manage their architectures. EA pros and subject matter experts from the business comprise these communities. The recent Forrester survey of EA professionals showed that EA leaders are planning to interact with a broader set of EA stakeholders, particularly with marketing, business strategy, HR, and CX pros (see Figure 2).[2]
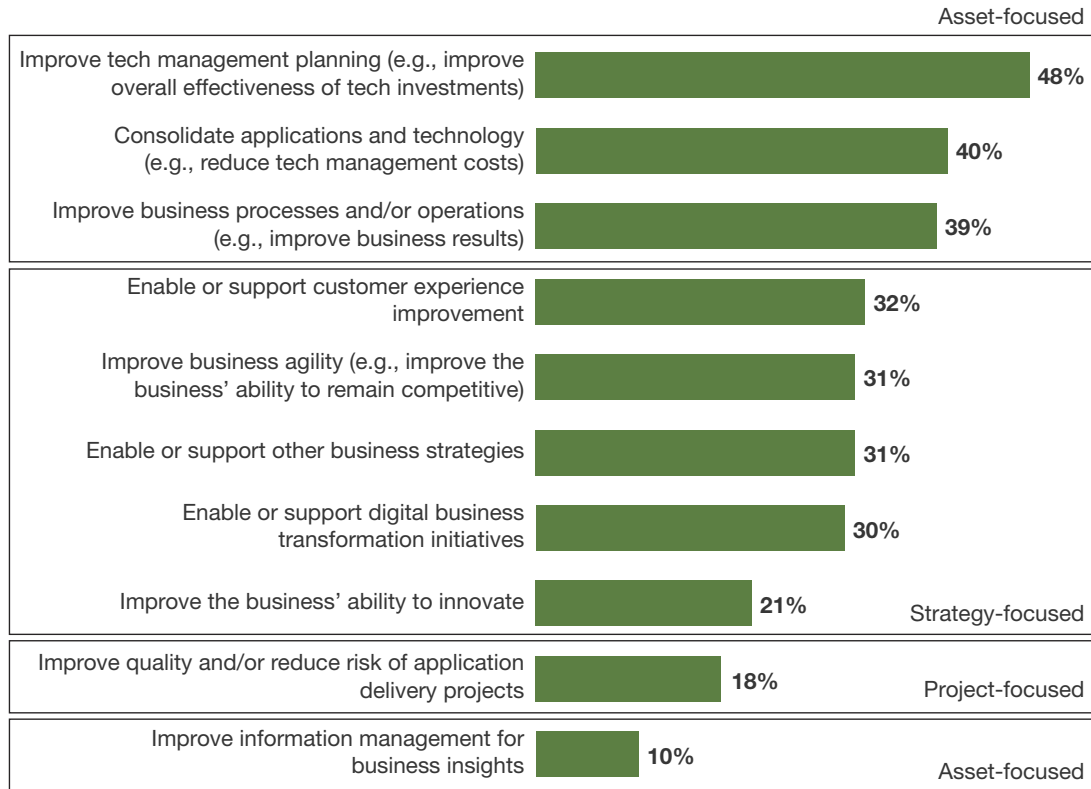
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FIGURE 1 Assets, Projects, And Strategy Drive EA Needs

"Rank the primary drivers for EA within your organization."
(Multiple responses accepted)

Asset-focused

Driver	Percentage
Improve tech management planning (e.g., improve overall effectiveness of tech investments)	48%
Consolidate applications and technology (e.g., reduce tech management costs)	40%
Improve business processes and/or operations (e.g., improve business results)	39%
Enable or support customer experience improvement	32%
Improve business agility (e.g., improve the business' ability to remain competitive)	31%
Enable or support other business strategies	31%
Enable or support digital business transformation initiatives	30%
Improve the business' ability to innovate	21%
Improve quality and/or reduce risk of application delivery projects	18%
Improve information management for business insights	10%

Strategy-focused

Project-focused
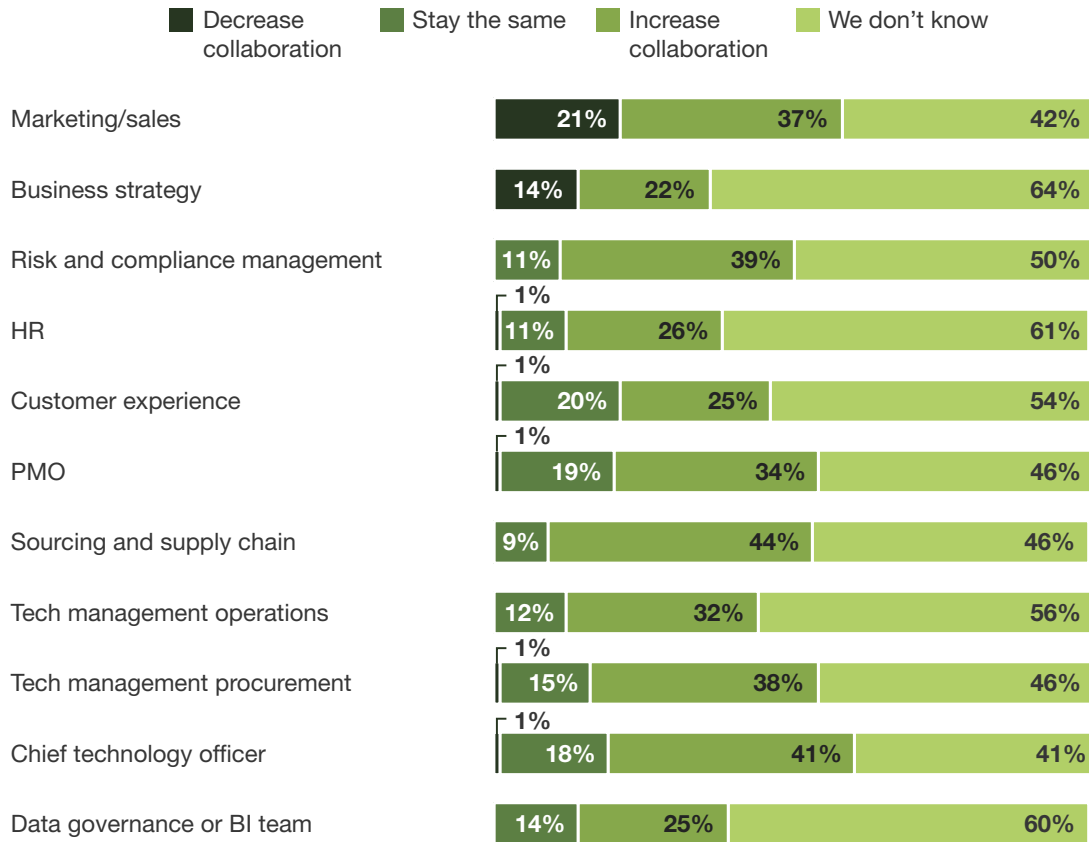
Asset-focused

Base: 114 global enterprise architecture professionals

Source: Forrester's Q3 2016 Global State Of Enterprise Architecture And Portfolio Management Online Survey

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FIGURE 2 EA Professionals Are Interacting With More Stakeholders

"Do you plan on changing EA relationships/collaboration with the following organizations?"

Legend:
- Decrease collaboration
- Stay the same
- Increase collaboration
- We don't know

Organization	Decrease collaboration	Stay the same	Increase collaboration	We don't know
Marketing/sales	21%		37%	42%
Business strategy	14%		22%	64%
Risk and compliance management	11%		39%	50%
HR	11%	1%	26%	61%
Customer experience		1%	20% / 25%	54%
PMO		1%	19% / 34%	46%
Sourcing and supply chain	9%		44%	46%
Tech management operations	12%		32%	56%
Tech management procurement		1%	15% / 38%	46%
Chief technology officer		1%	18% / 41%	41%
Data governance or BI team	14%		25%	60%

Base: 106 global enterprise architecture professionals
(percentages may not total 100 because of rounding)
Source: Forrester's Q3 2016 Global State Of Enterprise Architecture And Portfolio Management Online Survey

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For Vendors, The New Name Of The Game Is "Solutions For EA"

EAMS vendors, like most vendors, identify the need of a particular group of professionals — enterprise architects — and provide focused tools to assist them in their role. Over time, the EA role has expanded to cover strategy development, strategic portfolio management, strategic enterprise architecture, technology asset management, service management, and strategic delivery (see Figure 3). This has led vendors to undertake one of two strategies: 1) develop modular products targeting specific needs or 2) provide a complete solution for all needs. For either strategy, the EAMS vendor will provide two or more of the following capabilities:

› **Enable EA roles to influence, define, and translate strategy.** EAMS tools vendors are reacting to the need to provide both EA pros and non-EA employees with the methods and frameworks that support strategy development, strategic EA, and strategic delivery. Vendors supporting these capabilities have recognized the importance of the extended EA ecosystem focusing on supporting new roles, such as customer experience professionals or digital architects.

› **Help EA and PMO pros translate strategy and define strategic project portfolios.** Many EA vendors' offerings support project portfolios or, at the least, a mapping of projects to assets and capabilities. However, the consolidation of the EAMS market has seen a number of acquisitions that have introduced strategic portfolio management office (PMO) capabilities into the EA ecosystem.

› **Enable EA and tech management to effectively manage IT asset portfolios.** Tech management has had a variety of tools with which to manage the IT assets of a firm. However, the department also needs to manage IT assets through one repository. This has led to a number of vendors introducing technology asset management and service management into their EA offerings.

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FIGURE 3 Solutions For EA Are Expanding Vendor Offerings

You Must Choose The Right Vendor Based On Your EA Scope And Business Needs

EA professionals looking for an EAMS have a large and diverse market to analyze.[3] While EA is a broad discipline, many EA practices find that they address only a piece of the broad discipline (such as IT architecture), and vendor strengths vary based on which aspects of the broad discipline they focus on. To select the right vendor, EA professionals should first determine the needs of their stakeholders, the current scope of the EA practice, and most importantly, how EA scope will change in the future. Key considerations of EAMS products should include:

› **The flexibility of the tool to meet your EA management needs.** As your EA practice matures, the scope and expectations of EA may also change. Ensure that the products you consider enable you to customize aspects such as collaboration, workflow, metamodels, frameworks, artifacts, and deployments to meet the needs of your organization.

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› **Current and future EA role coverage.** As your organization realizes the benefits of EA, there will be a tendency for stakeholders to ask "Can you also do X?" This may include expanding outside your comfort zone and including different roles, such as customer experience architecture. Ensure that the product supports, or has a road map to support, your future EA needs.

> › **The ability to speed up EA professionals' contributions to major transformations.** Very few EA professionals are experts in business areas, particularly new fields such as digital experience and customer insights. EA professionals thus need help and will expect tools to provide assistance in these areas. Look for products that provide, or have clear road maps for, architectural accelerators in key areas that are important to your firm.

> › **The ease of use and visualization of the architecture.** Many firms are now adopting a community or ecosystem approach to their architecture practices. Stakeholders from outside the EA team must be enabled to contribute to the architecture. Look for tools that will provide your EA stakeholders with an appropriate experience for their interests. Test the user interface for effectiveness, ease, and emotion.[4]

Enterprise Architecture Management Suite Evaluation Overview

To assess the state of the EAMS market and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of 10 EAMS vendors. After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria (see Figure 4). We evaluated vendors against 40 criteria, which we grouped into three high-level buckets:

› **Current offering.** We evaluated each vendor's current offering against five core groups and 25 subgroups of criteria. The first core group — architecture modeling — includes EA frameworks, base models, and metadata and frameworks. The second core group — IT asset management — looks at support for life-cycle management, finance management, asset inventory, performance, and role support. The third core group — support for IT portfolio management — looks at capabilities for business case development, portfolio assessments, scenario planning, transition management, risk management, and portfolio analysis. The fourth core group — support for strategic transformation — includes strategic assessment and definition, performance management, and strategy execution. The final core group is stakeholder engagement, which looks at support for workflow, governance, collaboration, access rights, communication and reporting, personalization, and reference customer assessment. In total, these five core groups of criteria account for 50% of the overall score weighting.

› **Strategy.** We compared the strategies of each vendor against the needs of the specific roles seeking EA capabilities and industry trends to assess how well each vendor is positioned for future success. We examined each vendor's product strategy, including vision, planned product enhancements, delivery model, market approach, supporting services, and partner ecosystems (delivery partners and sales partners). In total, these criteria account for 50% of the overall score.

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> › **Market presence.** EAMS vendors face lots of competition as new players and substitute products enter the EA space. EA professionals must look for vendors that have strong and stable installed bases and growing or stable revenue streams. To determine the current market presence for our evaluation, we combined information about each vendor's installed base on current and previous versions, product revenue (and allocation to R&D), and growth.

How Current-Offering Criteria Are Scored

To assist EA professionals in evaluating EAMS products against their individual needs, we look for a baseline of offering capabilities that most vendors provide, then move on to enhanced, differentiating capabilities that we see as providing tangible customer value for the current offerings, thus identifying the key features that give a vendor an edge over its competitors. For the majority of criteria, the scores are based on a 0-5 scale; where there is less differentiation between the vendors, however, a scale consisting of 0, 1, 3, and 5 scores is used. A score of 0 shows that the vendor did not provide sufficient information or a vendor was either unable to demonstrate or does not provide support for some criteria.

Evaluated Vendors And Inclusion Criteria

Forrester included 10 vendors in the assessment: Avolution, BiZZdesign, BOC Group, Dragon1, Future Tech Systems, MEGA, Planview, Orbus Software, Software AG, and UNICOM. Each of these vendors has:

> › **A purchasable product.** There are many business and technology consulting firms that have mature, bespoke EA tools. In many cases, however, clients cannot acquire or purchase these tools. We selected vendors for evaluation only if they could provide evidence that their products are openly marketed and available for purchase to clients.

> › **Global presence.** The number of vendors providing EA tools is large. To limit the number of vendors, we selected vendors that demonstrated a global client presence and an ability to serve clients globally.

> › **Extensible metadata.** Forrester clients have continuously advised us of the need to add additional data and attributes to their EA repositories. As many vendors have bespoke or ArchiMate-compliant metadata models, we selected vendors that demonstrated the ability to extend the product's metamodel to further limit the number of vendors.

> › **Customizable workflows.** EAMS vendors often provide best-practice workflows to enable rapid deployment and implementation of their tools. However, many EA professionals have a need to implement their own workflows. Because of this, we selected vendors that demonstrated the ability to customize out-of-the-box workflows.

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› **Support for Forrester's EA archetypes.** Not all EA pros have the same needs. Firms may need their EA team members to be custodians of the firm's IT assets, change agents for the IT portfolio, or influencers and definers of strategy. Because of this, we selected vendors that had demonstrated support for modeling, IT asset management, IT portfolio management, and strategic transformation.

› **Mindshare among the Forrester client base.** The vendors we evaluated are frequently mentioned in Forrester client inquiries, shortlists, consulting projects, and case studies.

FIGURE 4 Evaluated Vendors: Vendor Information And Selection Criteria

Vendor	Product evaluated	Product version evaluated
Avolution	ABACUS	5.0
BiZZdesign	Enterprise Studio	2.3.0
BOC Group	ADOIT	7.5
Dragon1	Dragon1	4.0
Future Tech Systems	ENVISION	11.0
MEGA	HOPEX	2.0
Orbus Software	iServer	2017
Planview	Troux	13.0
Software AG	Alfabet	9.12
UNICOM	System Architect	11.4.4.2

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FIGURE 4 Evaluated Vendors: Vendor Information And Selection Criteria (Cont.)

Vendor inclusion criteria

Forrester included 10 vendors in the assessment: Avolution, BiZZdesign, BOC Group, Dragon1, Future Tech Systems, MEGA, Planview, Orbus Software, Software AG, and UNICOM. Each of these vendors has:

A purchasable product. There are many business and technology consulting firms that have mature, bespoke EA tools. In many cases, however, clients cannot acquire or purchase these tools. We selected vendors for evaluation only if they could provide evidence that their products are openly marketed and available for purchase to clients.

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Mindshare among the Forrester client base. The vendors we evaluated are frequently mentioned in Forrester client inquiries, shortlists, consulting projects, and case studies.
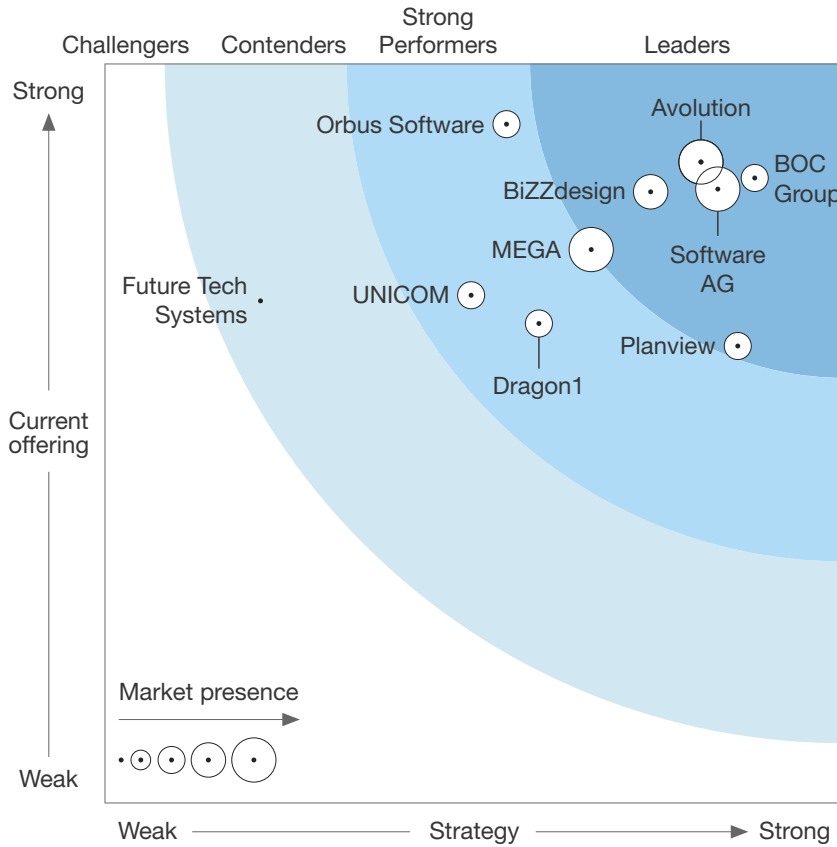
Vendor Profiles

This evaluation of the EAMS market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave™ Excel-based vendor comparison tool (see Figure 5).

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FIGURE 5 Forrester Wave™: Enterprise Architecture Management Suites, Q2 '17

FIGURE 5 Forrester Wave™: Enterprise Architecture Management Suites, Q2 '17 (Cont.)

	Forrester's weighting	Avolution	BiZZdesign	BOC Group	Dragon1	Future Tech Systems	MEGA	Orbus Software	Planview	Software AG	UNICOM
Current Offering	50%	4.33	4.13	4.22	3.24	3.39	3.74	4.59	3.09	4.15	3.43
Architecture modeling	10%	4.60	4.60	4.00	4.00	4.60	3.40	4.60	3.65	4.60	4.00
IT asset management	15%	3.80	4.55	4.10	3.65	3.65	3.85	4.60	3.05	4.10	3.40
IT portfolio management	20%	4.34	3.66	4.34	3.10	3.10	3.10	4.36	3.10	4.36	3.10
Strategic transformation	10%	4.10	4.10	3.55	4.10	4.10	3.55	4.10	3.00	3.55	4.10
Engagement with stakeholders	45%	4.50	4.10	4.40	2.80	3.00	4.10	4.80	3.00	4.10	3.30
Strategy	50%	4.03	3.68	4.39	2.93	1.05	3.28	2.71	4.27	4.14	2.47
Product vision	4%	5.00	5.00	4.00	3.00	5.00	5.00	5.00	5.00	5.00	4.00
Planned enhancements	2%	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Delivery model	9%	5.00	5.00	5.00	3.00	1.00	5.00	5.00	5.00	5.00	3.00
Market approach	43%	3.00	3.00	5.00	3.00	1.00	1.00	1.00	5.00	3.00	3.00
Supporting services	23%	5.00	3.00	3.00	5.00	1.00	5.00	3.00	3.00	5.00	1.00
Partner ecosystem	19%	4.40	5.00	4.40	0.00	0.00	5.00	4.40	3.60	5.00	2.20
Market Presence	0%	4.50	3.30	2.80	2.15	0.25	5.00	2.95	2.65	4.75	2.80
Installed base	50%	5.00	3.60	2.60	1.30	0.00	5.00	2.90	2.30	5.00	4.60
Revenue	50%	4.00	3.00	3.00	3.00	0.50	5.00	3.00	3.00	4.50	1.00
Average deal size	0%	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

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Leaders

› **BOC Group.** BOC Group, founded in 1995 in Austria, has built an established presence in eight countries, forming a worldwide network of resellers and partners. BOC Group's largest client segment is information services at 24%. BOC Group is competitive in all criteria but is particularly strong in IT asset management and IT portfolio management. Client references point to ease of use for non-EA stakeholders as an area for improvement.

› **Avolution.** Avolution, founded in 2001 when it spun off from University of Technology, Sydney, has now built established offices in six countries and developed a presence in over 95 countries through a worldwide network of tier 1 consultancies. Its largest client segment is finance. Avolution is one of the leading products, with a broad range of support for all criteria but particularly strong in IT portfolio management, strategic transformation, and stakeholder engagement. Client references point to ease of use for non-EA stakeholders as an area for improvement.

› **Software AG.** Software AG was founded in 1969 and acquired Alfabet in 2013. The company has built a large worldwide network of delivery and sales partners. Its largest client segments are financial services, energy, and logistics. Software AG is competitive in all criteria; however, it is particularly strong in EA frameworks, financial management, asset life-cycle management, modeling, IT portfolio management, and governance. Client references point to ease of use for both EA and non-EA stakeholders as an area for improvement.

› **BiZZdesign.** BiZZdesign was founded in 2000 in the Netherlands and has built an established presence across 10 countries, with a worldwide network of resellers and partners. Its largest client segments are government and financial services. BiZZdesign is competitive in all criteria but is particularly strong in product vision, IT portfolio management, and planned enhancements. Client references point to improved collaboration between EA and the firm's subject matter experts as an area for improvement.

› **Planview.** Planview was founded in 1989 and acquired Troux in 2015. It has a very strong market presence in the US. Planview's largest client segments are financial services, retail, and government. Planview is competitive in most criteria but is particularly strong in EA frameworks, metadata management, and security. Client references point to ease of use and modeling capability as areas for improvement.

Strong Performers

› **Orbus Software.** Orbus was founded in 2004 in the UK and has now built an established presence equally split between North America; Europe, the Middle East, and Africa (EMEA); and Australasia. Orbus' largest client segments are government, insurance, and financial services. Its product has the strongest current offering across all criteria but is particularly strong in life-cycle management, business case, modeling, scenario planning, and strategic assessment. Orbus' strategy is

comparable with the above Leaders, but the Leaders are currently differentiating from the pack through the adoption of Agile development methods and techniques. Client references point to client participation in co-creating the product road map as an area for improvement.

› **MEGA.** MEGA was founded in 1991 in France and has now built an established presence across nine countries, along with a worldwide network of distributors and partners. Its largest client segments are government and financial services. MEGA is competitive in all criteria but is particularly strong in portfolio analysis, communication and reporting, and strategic transformation. MEGA's strategy is comparable with the above Leaders, but the Leaders are differentiating through the adoption of Agile development methods and techniques. Client references point to ease of use for non-EA stakeholders as an area for improvement.

› **Dragon1.** Dragon1 was founded in 2005 in the Netherlands and is now in the process of spreading and expanding into other regions through partnerships with consultancies and students in Asia. Its largest client segments are government and consultancy. Dragon1 is competitive in most criteria but is particularly strong in strategic assessment, transition management, and communication and reporting. Areas for improvement include EA role support and workflow management.

› **UNICOM.** UNICOM was founded in 1981 in the US and acquired System Architect from IBM in 2016. It has a worldwide network of resellers and partners. UNICOM's largest client segments are government and financial services. UNICOM is competitive in most criteria but is particularly strong in portfolio analysis, strategic analysis, communication and reporting, and its use of a global sales partner network. Client references point to ease of use for non-EA stakeholders as an area for improvement.

Contenders

› **Future Tech Systems.** Future Tech Systems was founded in 1987 and has now built an established presence in Europe while expanding in North America. Its largest client segments are insurance, government, and education. Future Tech Systems is competitive in most criteria but is particularly strong in modeling, IT portfolio management, and strategic assessments. Client references point to IT asset management as an area for improvement.

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Supplemental Material

Survey Methodology

Forrester's Q3 2016 Global State Of Enterprise Architecture And Portfolio Management Online Survey was fielded to 179 technology management professionals involved in or familiar with EA from our ongoing technology management research panel and readers who have demonstrated an interest in EA research. The panel consists of volunteers who join based on interest and familiarity with specific technology management topics. For quality assurance, panelists are required to provide contact information and answer basic questions about their firms' revenue and budgets.

Forrester fielded the survey from July to August 2016. Respondent incentives included a complimentary webinar that discusses the survey results. Panels are not guaranteed to be representative of the population. Unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes.

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Online Resource

The online version of Figure 5 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. We evaluated the vendors participating in this Forrester Wave in part using materials that they provided to us by March 21, 2017.

› **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 products' functionality. We used findings from these product demos to validate details of each vendor's product capabilities.

› **Customer reference surveys.** To validate product and vendor qualifications, Forrester also conducted reference surveys with three of each vendor's current customers.

The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria for evaluation in this market. From that initial pool of vendors, we 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 evaluation — and then score the vendors based on a clearly defined scale. We intend these default weightings to serve only as a starting point and 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. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

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Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

Endnotes

[1] Both tech management's focus on IT planning, IT asset consolidation and risk management and business management's focus on business efficiencies and strategic execution (customer centricity, digitization, and agility) are the primary drivers for EA programs. See the Forrester report "The State Of EA 2017: Aspirations And Challenges."

[2] When asked about the relationship changes that EA pros were planning, there was a significant number of EA team members planning to increase relationships with non-EA stakeholders such as marketing, supply chain, HR, business strategy, risk and compliance, and CX pros. See the Forrester report "The State Of EA 2017: Aspirations And Challenges."

[3] Forrester's EAMS vendor briefings, vendor client interviews, and online research have found that there are approximately 50 vendors of all shapes and sizes targeting EA professionals. See the Forrester report "Vendor Landscape: Enterprise Architecture Management Suites 2017."

[4] Forrester's customer experience research has found that a good measure of customer experience quality is to assess three factors: emotion, ease, and effectiveness. These factors now guide all forms of customer engagement, including mobile design. See the Forrester report "Follow Best Practices To Encourage Mobile Insurance Use."

We work with business and technology leaders to develop customer-obsessed strategies that drive growth.

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