

40 Emerging software vendors

COMPANY	SOLUTION TYPE; TARGET CUSTOMER SIZE BY REVENUE; INDUSTRIES SERVED	NUMBER OF CUSTOMERS; KEY CUSTOMERS	GROWTH INDICATION	EDITORIAL INSIGHT
Accept Software Corporation <i>www.acceptsoftware.com</i>	Next-generation requirements management for makers of products with substantial software components, in the \$50-million to \$500-million revenue range	36; BEA Systems, Symantec Corp.	Private company, however, on track to triple 2005's revenue in 2006	Addresses the fact that only 25 percent of new product development funding today results in products that are both delivered and used by consumers
Activplant Corporation <i>www.activplant.com</i>	Enterprise management intelligence software solution provides analytics and reports that high-volume discrete manufacturers need for automotive, CPG, food & beverage, wood & forestry products	Installed in more than 300 plants worldwide; Ford Power Train in North America, GEMA, TRW Automotive, Toyota, Gillette	50 percent year-on-year growth; new contracts with some of the top names in manufacturing industry; 93 new plants added in 2005/2006	Frost & Sullivan recently recognized Activplant for its contribution to the manufacturing industry, awarding it the 2006 <i>Best Enabling Technology of the Year</i> award
Apriso Corporation <i>www.apriso.com</i>	MES/WMS/quality/supplier visibility in a single platform for A&D, automotive, medical device, pharmaceuticals, consumer goods, pulp & paper, metals, electronics, industrial machinery makers	160+; Volvo CE, MBDA, Ugitech, TNT, ST Microelectronics, GM-SAIC, Cummins Engine, Trixell, Case New Holland, Stryker, Pilkington	Multisite deployments, some numbering more than 80 sites—Tier 1 automotive supplier, 77 sites; world's largest paper company, 80 sites; world's largest supplier of automotive glass, 45 sites	In 2005, Apriso was awarded "Powered by SAP NetWeaver" certification; also among the first five software vendors to achieve the new "Powered by SAP NetWeaver, Interoperability" certification
Aras Corporation <i>www.aras.com</i>	Product life-cycle management (PLM) for discrete manufacturers	30; Motorola, Lockheed Martin, Rolls-Royce, ACCO Binders	Grew sales in 2005 by more than 120 percent	Aras says it's the only Microsoft-based SOA enterprise PLM solution on the market
Arena Solutions <i>www.arenasolutions.com</i>	Centralized environment for managing product data, making it easy to collaborate in real time regardless of geographic location or IT infrastructure; midsize manufacturers in medical, high-tech electronics, industrial	250+; Life Fitness, Leatherman, NetStreams	As of Q1 2006, Arena Solutions had an average quarter-over-quarter growth of 40 percent	Arena Solutions says it was the first company to deliver PLM on-demand; the company designed its service from the ground up as a scalable, multi-tenant architecture
Axway <i>www.axway.com</i>	BPM; majority of customers are in the Global 2000	Won more than 150 new enterprise customers in 2005; customer base totals 8,000+ companies	Projected revenue in 2006 is \$130 million to \$140 million	Forrester Research says Axway's acquisition of Cyclone Commerce will create a company with comprehensive integration technology and global presence
CAPE Systems <i>www.capesystems.com</i>	Product suite addresses a company's supply chain needs from product design, order picking, palletization, and truck optimization to warehouse management; food & beverage, pharmaceutical, 3PL, consumer, automotive	More than 4,000; Fossil, UPS Supply Chain Solutions, La-Z-Boy	Packaging division is growing an average of 8-percent + per year; enterprise division developing impressive pipeline for 2006-2008	CAPE focuses on bringing a brand new perspective on light directed picking systems, with semi-off-the-shelf WMS application customized for each company
Cimnet <i>www.cimnetinc.com</i>	Industrial Portal and MES for Fortune 100-1000 in discrete, food & beverage, pharmaceutical, CPG	More than 1,000; Alcoa, Tyson, Johnsonville Sausage	Grew sales by more than 60 percent in 2005 and more than 70 percent during the first six months of 2006	Cimnet is the only MES vendor offering a subscription sales model; focused on delivering highly configurable MES
E2open <i>www.e2open.com</i>	Supply chain software-as-a-service (SaaS) for visibility and control over distributed global supply networks; large enterprises focused in the electronics, aerospace, automotive industries	12,000 companies; Tyco Electronics, Etron	Grew sales outside flagship electronics industry by over 100 percent	SaaS technologies address complex supply chain management processes—an area industry experts previously believed could not be addressed by using on-demand technologies
Edge Dynamics <i>www.edgedynamics.com</i>	On-premise, hosted, and hybrid solutions that optimize transaction-stream processing to address critical business challenges in operations performance, regulatory compliance, and brand integrity; serves the life sciences industry	Approximately 15 customers; CV Therapeutics, Daiichi Sankyo	Solution optimizes more than \$100 billion in annual revenues, representing nearly 35 percent of all U.S. pharmaceutical channel volume	Founded in 2002 to bring to market a channel-commerce solution for management of financial performance at the beginning of the order stream
Egos Ltd. <i>www.egos.com</i>	Global sourcing and supplier-management solutions for manufacturers, streamlining and standardizing processes across the extended supply chain; \$1 billion +; apparel, consumer goods, electronics	10 major customers with extended supply chain; includes thousands of companies and users	Grew revenues by 60 percent last year; doubled customer base in 18 months; profitable over the last three years	Sainsbury uses solution in more than 800 stores, more than 100 depots, almost 55,000 SKUs, with approximately 3,000 users; manages 15 billion + daily and weekly metrics
Exostar <i>www.exostar.com</i>	Secure, collaborative supply chain network meets needs to do business online with suppliers, trading partners, and even competitors; \$5 billion +; A&D, discrete manufacturing, high-tech	50 major customers and more than 7,000 smaller customers; 30,000 + registered companies on the platform service	Transactional volume represents 8 million transactions for \$23 billion + worth in goods and services, a 130-percent increase over 2004; added 4,000 new trading partners	Exostar was a darling of the Internet economy, when B2B exchanges were all the rage. But unlike so many others, today Exostar is addressing the convergence of security and supply chain
Exsys <i>www.exsys.com</i>	Knowledge automation expert system bridges the gap between data analytics and real-world business needs to give customers and employees recommendations and advice; manufacturing, plant operations, process control	More than 14,000 users worldwide, including half of Fortune 100 companies	Grew revenue by more than 50 percent in 2005—even greater growth is expected for 2006	System captures the expert's problem-solving logic and process and follows the same steps the expert does to produce a reasoned recommendation based on logic that can be traced and reviewed
EyeLit <i>www.eyelit.com</i>	MES, asset management, product costing, CAPA (OCAP), factory scheduling, enterprise, and factory integration; typically SMB market in semiconductor, high-tech discrete, automotive, A&D, life sciences	More than 40; signed five new customers in the last nine months	Grew sales 70 percent in 2005—projects 50 percent to 70 percent for 2006; recorded ninth straight year of profit in 2005	Won 2006 AMR Research Award for Innovation; only MES solution with customer (VTI) running high-volume (half-million parts a week) Linux-based solution
Firepond <i>www.firepond.com</i>	On-demand, multi-tenant solution enables sales force and supporting organizations to configure, price, and quote products and services; high-tech, manufacturing, medical products, office equipment	Plant Equipment, Sonitrol Corporation	Significant user growth over the past year; amount of subscribers increased by 62 percent	Firepond's vision is to provide a full suite of on-demand or software-as-a-service products for the quote-to-order fulfillment business process
FreeFlow <i>www.freeflow.com</i>	Identify at-risk, excess, and obsolete inventory, matching it with the buying community, increasing product life-cycle profitability while avoiding channel conflict; \$2 billion +; high-tech, consumer electronics, discrete manufacturing	25; Motorola, Microsoft, InFocus	Doubling year-over-year sales for the fourth straight year in 2005, FreeFlow added indirect sales channels with authorized resellers	Unique combination of hosted, Web-based private-auction platforms with high-touch business services to maximize customers' financial returns while lowering inventory management overhead
Incuity Software <i>www.incuity.com</i>	Business intelligence software; range from \$200 million to \$11 billion; oil & gas, food & beverage, specialty chemicals, steel & metals	Approximately 1,000	Added approximately 250 customers over the past year	Enables corporate management to view time-series data from the plant floor integrated with transaction-oriented information
Interlace Systems <i>www.interlacedsystems.com</i>	Business planning solution bridges the gap between traditional operational and financial planning systems; greater than \$250M in revenue; consumer products, industrial manufacturing, high-tech	Mitsubishi-Caterpillar, Eaton Corporation, Seagate Technologies	In August 2006, introduced on-demand presentation and meeting-management package for executive sales & operations planning (S&OP)	Companies continue to rely on "blood, sweat, and Excel" for integrated business planning and S&OP; Interlace combines the simplicity of Excel with the richness and robustness of an enterprise solution
IQMS <i>www.iqms.com</i>	ERP software specifically for the midmarket manufacturer; \$10 million to \$500 million; medical, automotive, consumer products, packaging, plastics	350+; Plastic Products Corp., Monoflo, Davalor, Trimek	Increased sales in double digits every year for the past five years; this year up almost 30 percent from where IQMS was last year at this time	Single-source solution encompasses every aspect of the enterprise, from quality to fixed assets to warehouse management to EDI; uses no third-party software providers
IQNavigator <i>www.iqnavigator.com</i>	Software-as-a-service (SaaS) business application software suite manages outside-services spending worldwide; for flexible staffing adjustments by shift and by day, based on changing production requirements	40+	Nearly doubled revenue each year for the last five years, and achieved profitability in 2005 (both cash-flow and net-income GAAP profitability)	Many legacy software companies have SaaS products that merely add hosting. True SaaS uses multi-tenant capabilities to reduce costs

A&D=aerospace & defense; BPM=business process management; ERP=enterprise resources planning; CPG=consumer packaged/product goods; MES=manufacturing execution system; PLM=product life-cycle management; SCE=supply chain execution; SCP=supply chain planning

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Kinaxis <i>www.kinaxis.com</i>	On-demand response-management service enables brand owners and manufacturers to respond to change across supply chain network; electronics & high-tech, A&D, automotive, industrial, medical device	400 manufacturing sites around the globe, including some of the largest brand owners and manufacturers in the world; five of the top 10 contract manufacturers	46-percent increase in number of customer sites (2004-2005)	Introduced a Web-based, on-demand RapidResponse service, establishing itself in software-as-a-service offerings that address critical supply chain challenges
Liaison Technologies <i>www.liaison.com</i>	Helps companies maximize profits through shortened time-to-market, improved supply chain flow, and synchronized product information; Fortune 500 in paper & packaging, manufacturing, pharmaceutical	More than 2,500 leading companies.	Growth over the last two years: in 2004 grew 60 percent over 2003, and in 2005 grew 43 percent over 2004.	Liaison Technologies recently completed an operational merger with the leading European paper industry e-commerce and supply chain provider, Expresso Paper Platform BV
MCA Solutions <i>www.mcasolutions.com</i>	Service-planning and optimization suite helps companies maximize services supply chain through efficient parts planning and optimization; more than \$1 billion in high-tech, semiconductor, telecom, defense, airlines, MRO, capital equipment	12 customers; 20 deployments	Revenue grew 45 percent in 2005, and has grown more than 400 percent since 2002; In May 2006, MCA solidified a strategic partnership with SAP	ARC Advisory Group's January 2006 study, <i>Advanced Inventory Optimization</i> , named MCA Solutions the market leader in parts inventory optimization
Metreo <i>www.metreo.com</i>	Price-optimization software enables global manufacturers to achieve profit improvements through better pricing decisions and disciplined execution	25; multiple business units of a Fortune 100 multinational conglomerate	Metreo was acquired by Symphony Technology Group in 2006, providing for a well-funded and stable operating environment	One of the few privately funded software companies in the heavily venture capital-sponsored pricing market
MetricStream <i>www.metricstream.com</i>	Enterprise quality and compliance management used by leading corporations in industries such as automotive, food, pharmaceuticals, manufacturing, electronics	40; Pegasus Wireless, St. Jude, Amgen, Nektar, Sandisk, Amkor	AMR Research looked at vendors in compliance and rated MetricStream as one of the fastest-growing vendors in the space, with an estimated annual growth rate of more than 100 percent	Investments from venture capital firms Kleiner Perkins and Integral Capital in association with corporate investors Cisco, Novell, and Oracle enable continued pursuit of market leadership
Omniify Software <i>www.omniifysoftware.com</i>	Product life-cycle management solution helps OEMs streamline development cycles, accelerate product innovation, and improve profitability; under \$500 million; discrete manufacturers, electronics, mechanical, medical device	102; Lockheed Martin-Savi Technologies, Texas Instruments, Xicom Technology, Harman Specialty Group, Welch Allyn, Carlo Gavazzi, Crystal Technology	50-percent growth in 2005	Offers affordable solutions for the SMB market, especially for managing compliance issues; business-ready solution is easy to use and quick to implement
Online Development <i>www.oldi.com</i>	Appliance for IT connectivity is a two-tier solution for plant-floor-to-IT connectivity; Fortune 100.	25, including Mittal Steel, Blue Scope Steel, Bridgestone Firestone, Mallinckrodt Tyco Healthcare, Qualcomm, Caterpillar, Wyeth Ayerst, Labatts	Reached record sales of 13.5 million in 2005; 20-percent growth per year since 2000	Appliances bridge the gap between plant floor and the enterprise, and are being used more often based on simplicity of management
Optiant <i>www.optiant.com</i>	Supply chain design, advanced inventory optimization, and risk management; more than \$1 billion; CPG, high-tech, life sciences, chemicals	40; Procter & Gamble, Microsoft, Black & Decker, Celanese, PolyOne, Dupont, Kraft Foods	Reached three times the average sales volume of previous years in first half of 2006	Technology out of MIT and the Sloan School of Management
Parsec Automation <i>www.parsec-corp.com</i>	Performance-management software used by pharmaceutical, food & beverage, consumer products, automotive to boost overall equipment effectiveness, improve asset utilization, reduce waste, heighten profitability	More than 300; Revlon, Merck, Chemtura, Boehringer Ingelheim	Increased license revenue by more than 500 percent in the first six months of 2006 compared to all of 2005, while growing the customer base by more than 200 percent	Uses dynamic-modeling tool instead of traditional programming, making it effective for use by productivity experts and not just IT specialists
Pavilion Technologies <i>www.pavtech.com</i>	Applications that improve manufacturing and environmental processes; advanced process control and production performance management; \$100 million to \$1 billion; cement, chemicals, consumer products, pharmaceuticals	400 manufacturing sites with between one and 60 applications running throughout; Sterling Ethanol, Badger State Ethanol, Amazing Energy, Floursid SpA	License revenue growth of 52 percent from fiscal 2005 to fiscal 2006; compounded annual growth rate exceeds 30 percent for the past three years	Key supplier in pursuit of the plant-to-enterprise bridge, helping manufacturers leverage the models of the plant process to provide robust, instantaneous, and predictive metrics at the enterprise level
Procuri <i>www.procuri.com</i>	Optimal supplier selection, vendor performance, contract management, spend analysis and compliance; all sizes; manufacturing, pharmaceutical, electronics/high-tech, logistics/transportation, consumer goods	More than 350; in the first half of 2006, Procuri signed 32 new customers	Experienced significant year-over-year growth (70 percent over the last three years); 2005 was a record-breaking year for Procuri with 149 signed contracts, including 51 new customers	Company expanded beyond e-auction roots to offer a comprehensive suite that includes strategic sourcing, supplier management, spend analysis, contract management, and compliance
Questra Corporation <i>www.questra.com</i>	Intelligent device-management (IDM) solutions; Fortune 1000 companies; medical device, discrete manufacturing, security & detection, industrial infrastructure	30 customers throughout North America, Asia, and Europe	Reached record IDM software and services sales in 2006	In the hypercompetitive global economy, customers are demanding a proactive approach to delivering high equipment uptime and performance
RuleStream Corporation <i>www.rulestream.com</i>	Rules-driven product management as an extension of PLM and ERP solutions; \$100 million +; industrial machinery/equipment, automotive, A&D, high-tech, other discrete manufacturing	25; Omega Design, Robbins & Myers, Unex	Completed first enterprise-level front-and back-office implementation at a large U.S. manufacturer that has now run more than \$1 billion worth of their products through the system	Knowledge capture and reuse allows manufacturers to make information-driven decisions that accelerate product planning, design, and production for new product design and engineer-to-order business processes
ServiceBench <i>www.servicebench.com</i>	Automation of the service supply chain; \$500 million to \$70 billion; appliances, consumer electronics, computers, HVAC, construction, plumbing, outdoor power equipment	34, including a major computer manufacturer and two heavy equipment manufacturers	42-percent year-over-year growth	Partners with market leaders within selected verticals to define solutions for the entire service supply chain with on-demand system and fully integrated service-management solutions
Servigistics <i>www.servigistics.com</i>	Service-parts management, pricing management, and workforce management; Greater than \$500 million in revenue; high-tech, aerospace, automotive, telecommunications, medical equipment, consumer durables, heavy industrial	100; Electrolux, Eurocopter, Blue Coat, Konica Minolta, LG Electronics, Diebold, CNH, IBM, Hitachi Data Systems, DecisionOne, Mazda, Ford, GE	100-percent year-over-year revenue growth from 2005 to 2006	Service-parts management, workforce management, and pricing solutions on a single platform enable companies to transform their global service operations
SigmaQuest <i>www.sigmaquest.com</i>	Business intelligence throughout the product life cycle; OEMs and contract manufacturers (\$100 million+ in revenue) in regulated industry or mandated by end customer; electronic components, high-tech, life sciences, automotive, aerospace	More than 90 + locations; Calix, McDATA, Advanced Neuromodulation Systems, Avago	SigmaQuest is growing 100+ percent year over year	Enhanced product offering to track the quality of suppliers' components and deliver knowledge about defects, trends, and root-causes on products returned by end customers
Sopheon <i>www.sopheon.com</i>	Product life-cycle management; Global 1000; CPG, high-tech, chemical, and related industries	70+; Electrolux, Timex, Reckitt Benckiser, Chiquita	Number of end-user licenses increased by 35 percent in 2005.	Automates the innovation process and provides strategic decision support that increases the business return from new products
SymphonyRPM <i>www.symphonyrpm.com</i>	Performance-management solutions; customers typically range from the tens of millions of dollars in revenue per year to multibillions; CPG/retail, pharmaceutical, high-tech	Four OEM partners and 100+ customers; partnerships include Agile Software	Added two ISV OEM partnerships so far in 2006, and one very large system integrator; significant growth of more than 50 percent of end customers through 2006 partner ecosystem	Attained one of the highest rankings in Ventana Research's 2006 performance-management vendor and product scorecard
Ultriva <i>www.ultriva.com</i>	Lean manufacturing software for the factory floor, suppliers, and their customers; ranges from \$500-million to multibillion-dollar corporations; all discrete manufacturers	More than 80; OK International (a division of Dover); American Water Heater	Revenues are up 70 percent this year over last	Vendor says suite of lean applications can be deployed in one to two weeks, and integrated with ERP systems in two to four weeks
Zilliant <i>www.zilliant.com</i>	Price-management software; \$1-billion B2B companies; manufacturing, distribution, industrial service	30; Parker Hannifan, Acuity Brands, John Deere	First half of 2006 was very strong with revenues and bookings growing well over 400 percent YOY; for all of 2005, revenues grew 400 percent from the previous year	Gartner recently released its 2006 Hype Cycle for CRM Sales and cited price-management and optimization applications as among the highest-benefit CRM applications

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Comments on vendor selection criteria can be found on the back of this chart.