

WINTERGREEN RESEARCH, INC.

**Worldwide Mid Market Business SOA Market Shares,
Strategies, and Forecasts, 2009 to 2015**

Mid Market Business SOA Set to Grow Rapidly



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

MID MARKET SOA
SMB SOA CHANNEL STRATEGY
SMB SOA MARKET SHARES
MID MARKET SOA MARKET FORECASTS
MID MARKET Go-to-Market Strategy
PARTNER GO TO MARKET
SMB SALES ENGAGEMENT
INTERNET PARTNER SOA
WEB SERVICES FOR THE MID MARKET
SOA Advances In Technology
Internet as a SOA Channel

Mid Market Business SOA
Mid Market Business SOA Economic Forces
SMB SOA Flexible Engagement Approach
SOA E-Business
Business Components Services
SOA Automated Process
Business Integration
Event-Driven Business Components

OPPORTUNITY ABOUNDS

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LEXINGTON, Massachusetts (June 22, 2009) – WinterGreen Research announces that it has a new study on Worldwide Midmarket SOA middleware. The 2009 study has 796 pages, 233 Tables and Figures. Worldwide are poised to achieve significant growth as mid market software become less expensive to buy and operate. The markets start to expand to provide productivity improvements for mid size businesses.

According to Susan Eustis, lead author of the study, “innovation is what drives market growth in every industry. IBM and the major SOA vendors are finding new ways to support innovation, providing software that supports flexible response to changing market conditions. SOA reaches into every industry and every segment of the economy. SOA drives innovation for the very large enterprises, now the mid range size companies and very small organizations are adopting technologies similar to what the enterprise use, creating automated process to replace manual process.”

Breakthrough technology in mid market business applications brings advancements that provide customers with personal transportation choices never before available. Mid market business applications software acquisitions have centered on critical middleware business applications. Middleware is the integration software that brings the database and the application layers together. SOA delivers and deploys information in the context necessary to make good decisions.

Business intelligence serves up information on dashboards. Content and document management is used to store and find information in any format. Process management of workflow provides automated process that delivers business efficiency.

IBM is the leader in mid market infrastructure SOA markets with 66% share. Oracle / BEA / Sun participates in the mid market SOA infrastructure markets with 18% share in 2008.

SOA mid market infrastructure driving forces depend on model driven architectures. The IBM infrastructure for xml data management is useful as SOA in the mid market. The broad IBM SOA product set is tuned for business automation of process and workflow. Automated process that is flexible is poised to achieve significant innovation support in response to changing market conditions.

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SOA infrastructure and component services provide flexibility because they permit reuse of code modules, breaking ungainly monolithic applications into modules that can be accessed in different ways at different times. SOA distributed components enable IT to nimbly respond to the needs of business. Organizations harness the flexibility provided by services to create a sustainable competitive advantage.

IBM is the leader in SOA infrastructure markets with 70% share. No other vendor has above 11% market share and software vendors are merging and making acquisitions at a rapid pace seeking to achieve SOA product sets that are credible. IBM dominates the SOA Web services markets because of its broad set of software and hardware product lines in combination with a strong global services team.

Go-to-market strategy is positioned to address the channel that reaches mid markets. The ability to access network intelligence can really enhance business applications. By utilizing open APIs SOA architecture is used to provide model driven management of applications. Flexible response to changing market conditions is achieved. Mobility services are supported.

The SOA engine technology partners are making network intelligence actionable. Unique solutions are enhanced by adding contextual information like location to applications.

Go-to-market strategy focuses on who to sell to, what to sell, and how to sell. Customer bases form a target market. This explains the value of a customer base that comes through an acquisition. Customer partnerships are a central aspect of go-to-market strategy.

Go-to-market strategy is a new sales model. Global portfolio management is part of the go-to-market strategy process. Dedicated innovation functions align offerings proactively with demand generated market activity. Partner management is used to extend geographical coverage and complement offer portfolios.

Business mid market services oriented architecture (SOA) infrastructure market forecasts indicates strong growth. The ability to implement flexible automated process in the mid market depends on vendor channel motivation. The channel is set for significant growth as mid size companies seek to embrace innovation and improve productivity, providing competitive advantage.

Markets at \$895.6 in 2008 are set to grow to \$2.9 billion by 2015. Growth is a result of an integrated product set that leverages best of breed technologies, improving business process with automation.

Markets are growing in response to demand for SOA powered systems that delivers integration in the form of component software. Reusable software lowers the total cost of ownership by a significant amount.

Mid Market Business SOA Companies Profiled

Mid Market Business SOA Market Leaders

IBM
Tibco
Hewlett Packard (HP)
Progress Software
Microsoft
Cisco
Oracle
Red Hat JBoss Enterprise SOA Platform

Mid Market Business SOA Market Participants

Mid Market SOA Business Company Profiles

AmberPoint
BMC
EMC
Envoy Technologies
Fiorano
Fujitsu
GXS
Information Builders
Information Builders iWay Software
MQSoftware
SeeWhy
SOA Software
Software AG
Vitria Technology
Workday
InfoTollgate

Worldwide Mid Market Business SOA Market Shares, Strategies, and Forecasts, 2009-2015

REPORT METHODOLOGY

THIS IS THE 409TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPANT IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS IS A CENTRAL PART OF THE STUDY. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

FINDINGS AND CONCLUSIONS OF THIS REPORT ARE BASED ON INFORMATION GATHERED FROM INDUSTRY SOURCES, INCLUDING MANUFACTURERS, DISTRIBUTORS, PARTNERS, OPINION LEADERS, AND USERS. INTERVIEW DATA WAS COMBINED WITH INFORMATION GATHERED THROUGH AN EXTENSIVE REVIEW OF INTERNET AND PRINTED SOURCES SUCH AS TRADE PUBLICATIONS, TRADE ASSOCIATIONS, COMPANY LITERATURE, AND ONLINE DATABASES. THE PROJECTIONS CONTAINED IN THIS REPORT ARE CHECKED FROM TOP DOWN AND BOTTOM UP ANALYSIS TO BE SURE THERE IS CONGRUENCE FROM THAT PERSPECTIVE.

THE BASE YEAR FOR ANALYSIS AND PROJECTION IS 2008. WITH 2008 AND SEVERAL YEARS PRIOR TO THAT AS A BASELINE, MARKET PROJECTIONS WERE DEVELOPED FOR 2009 THROUGH 2015. THESE PROJECTIONS ARE BASED ON A COMBINATION OF A CONSENSUS AMONG THE PRIMARY CONTACTS COMBINED WITH UNDERSTANDING OF THE KEY MARKET DRIVERS AND THEIR IMPACT FROM A HISTORICAL AND ANALYTICAL PERSPECTIVE. THE ANALYTICAL METHODOLOGIES USED TO GENERATE THE MARKET ESTIMATES ARE BASED ON PENETRATION ANALYSES, SIMILAR MARKET ANALYSES, AND DELTA CALCULATIONS TO SUPPLEMENT INDEPENDENT AND DEPENDENT VARIABLE ANALYSIS.

YOU MUST HAVE THIS STUDY

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Worldwide Mid Market SOA Business Market Shares, Strategies, and Forecasts, 2009 to 2015

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, RESEARCH STRATEGY IDENTIFIES MARKET TRENDS THROUGH READING MARKET MATERIALS AND INTERVIEWING OPINION LEADERS. **WINTERGREEN RESEARCH TEAM** WORKS TO GATHER PRIMARY INFORMATION FROM COMPANY INTERVIEWS, INDUSTRY MATERIALS, AND COMPANY DOCUMENTS TO WRITE MARKET RESEARCH STUDIES FROM AN INDEPENDENT PERSPECTIVE. THE ABILITY, TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT **WINTERGREEN RESEARCH** IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS AN ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE, INDEPENDENT DATA.

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