

**Worldwide Services Oriented Architecture (SOA)
Infrastructure Market Shares, Strategies, and Forecasts,
2009 to 2015**

SOA Consumes IT -- Markets 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

SERVICES ORIENTED ARCHITECTURE INFRASTRUCTURE
SOA
SOA INFRASTRUCTURE FORECASTS
SOA INFRASTRUCTURE MARKET SHARES
MANAGEMENT CHALLENGES OF SERVICE-ORIENTATION
SOA GOVERNANCE
SOA ESB
SOA REPOSITORY
SOA Directory
SOA Advances In Technology

Services Oriented Architecture (SOA) Flexible Infrastructure
SOA Management and Security

SOA Management
Monitor SOA
Manage SOA
Application Service Levels
SOA Business Process
SOA IT
SOA Flexible Response To Changing Market Conditions
Innovation For The Very Large Enterprises
SOA Innovation

OPPORTUNITY ABOUNDS

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Worldwide Services Oriented Architecture (SOA) Infrastructure Market Shares, Strategies, Forecasts, 2009-2015

LEXINGTON, Massachusetts (April 18, 2009) – WinterGreen Research announces that it has a new study on Worldwide services oriented architecture (SOA) infrastructure markets. The 2009 study has 954 pages, 333 Tables and Figures. Worldwide services oriented architecture (SOA) infrastructure is poised to achieve significant growth as IT seeks to build software that is more flexible, less expensive to buy and operate, and supports flexible response to changing market conditions. The infrastructure markets are poised for rapid growth as companies implements web services in controlled environments.

Services Oriented Architecture SOA Infrastructure Market Strategy, Market Shares, and Market Forecasts, 2009-2015

IBM dominates SOA with 70% of the market, the rest of market is divided between 12 other participants with measurable market share, none of whom have even been able to garner as much as 8% of the market. IBM is the defacto industry standard leader in SOA. IBM dominates the SOA infrastructure markets with an infrastructure offering that can be used to achieve integration in a heterogeneous IT environment and solid services support to permit the large enterprises to change their business model.

IBM stands alone as a leader in SOA, inventing the concept of refining reusable solutions that have been around for a long time, adding a unique component and SOA manner, by making the SOA components work to create a worldwide integrated enterprise. While the IBM SOA is able to be used as a solution that works across a global enterprise, the SOA services as implemented in a middleware infrastructure are flexible enough to provide for local variation.

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. It is useful for very large enterprises, mid range size businesses, and very small organizations.

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Services oriented architecture (SOA) represents a fundamental change in the way automated process is delivered to replace manual process. Service enabling offerings are a response to the fundamental change in IT, where enterprise competitive advantage is gained from having IT flexibility. Software infrastructure companies have 'service enabled' their offerings in response to demand for the flexibility needed to operate a global enterprise. This service enabling of offerings represents a promise that the software vendor has the ability to build solutions that can be modified and updated in response to changing market conditions.

Enterprise IT departments use SOA to tie together the various assets and get more from the existing investment. To accomplish this, systems integration is needed to create ever changing solutions. Software infrastructure vendors need a strong middleware infrastructure as a fundamental underpinning to creating SOA that works. The ability to create and support service enabled offerings depends on having a strong middleware offering.

Innovation is supported by SOA. SOA can be used to change IT environments to support innovation. Issues affecting enterprises relate to IT efficiency. IT is seeking to respond to the decline of the financial markets and the collapse of the economy with cost cutting that still achieves automated process. All enterprises have a multitude of IT systems and applications to meet their varied and growing business requirements.

SOA represents a way to decrease IT costs by a quantum amount. Costs can be reduced by 90%. Implementing SOA needs to be done on an application by application basis. Each of these individual systems and applications has their own way of storing and exchanging business data. Business processes span multiple applications and integrating them to facilitate flow of information using SOA has created challenges for IT.

SOA stacks of decoupled services are purpose built for the enterprise environment that is continuously shifting because of mergers and acquisitions. With decoupled software solutions, the web services and the SOA components can be portable. SOA markets at \$3.3 billion in 2008 are anticipated to grow at an average rate of 17.1% per year to \$10.3 billion by 2015. Growth is a result of IT department efforts to reduce spending on run time and to spend a higher proportion of their budgets on growing the business.

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Services Oriented Architecture (SOA) Infrastructure Companies Profiled

Services Oriented Architecture (SOA) Infrastructure Market Leaders

IBM
Software AG
Tibco
Progress Software
Microsoft
MQSoftware
Oracle
Oracle / BEA Systems
Hewlett Packard (HP)

Services Oriented Architecture (SOA) Infrastructure Market Participants

SERVICES ORIENTED ARCHITECTURE (SOA) COMPANY PROFILES

AmberPoint
BMC
Cisco
EMC
Envoy Technologies
Fiorano
Fujitsu
GXS
Information Builders
iWay Software
SeeWhy
SOA Software
Vitria Technology
Workday / Cape Clear

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REPORT METHODOLOGY

THIS IS THE 405TH 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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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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ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE SERVICES ORIENTED ARCHITECTURE, CONTENT MANAGEMENT, MID SIZE BUSINESS MIDDLEWARE, WORLDWIDE ENERGY MARKETS, SOLAR UTILITY MARKETS, SOLAR TECHNOLOGY MARKETS, THIN FILM BATTERY MARKETS, WEBCAM MARKETS, REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, NANOTECHNOLOGY, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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