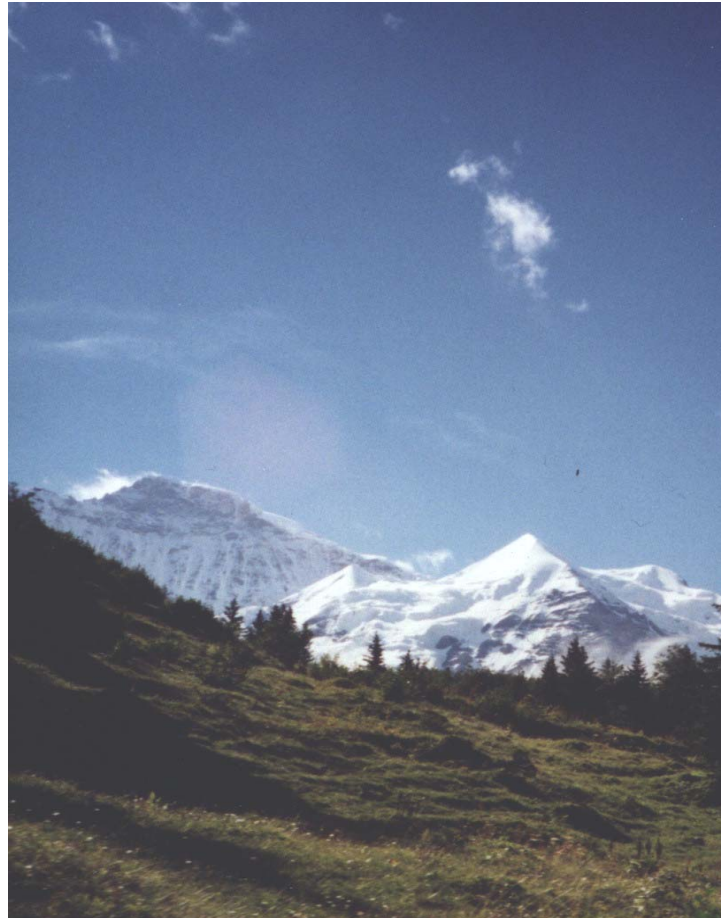


**Services Oriented Architecture (SOA) Infrastructure Market  
Shares, Strategies, and Forecasts, 2008 to 2014**

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**SOA Engines Create Infrastructure**

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*Picture by Susie Eustis*

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**CHECK OUT THESE KEY TOPICS**

**SERVICES ORIENTED ARCHITECTURE (SOA) MARKET SHARES**  
**SOA Market Forecasts**  
**SOA Engines**

**Services Oriented Architecture (SOA) Unlock Business Value**

**SOA Ability To Transform Business**  
**SOA Business Process Management (BPM)**  
**SOA Collaboration**  
**SOA Workflow**  
**SOA DEVELOPMENT**  
**SOA METHODOLOGY**  
**SOA BUSINESS INTEGRATION FOUNDATION SYSTEMS**  
**SOA TECHNOLOGY ISSUES**  
**SOA SERVICES**  
**SOA BUSINESS BENEFITS**  
**EVENTS**  
**PROCESS ORIENTED ARCHITECTURE**  
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**SERVICES ORIENTED ARCHITECTURE (SOA)**

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## **Services Oriented Architecture (SOA) Infrastructure Market Strategies, Market Shares, and Market Forecasts, 2008-2014**

**IBM is the defacto industry standard market leader in SOA. IBM dominates SOA with 64% 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 dominates the SOA infrastructure markets with more than half of the market because it has the 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.**

**Significant acquisition activity has occurred as all the major computer software and hardware players seek to adjust to the new architectures offered by SOA. Oracle bought BEA, Software AG bought webMethods to mention only a few of the most significant acquisitions.**

**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.**

**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.**

Many software companies do not have the basic application integration and messaging core middleware infrastructure needed to run the IT departments efficiently; thus there is a flurry of SOA activity as enterprises companies seek to acquire the right middleware technology that reduces the cost of running the IT department.

Process is sequence. Information is stored in databases, but it is used as process, a sequence of events tied together with calculations and movement of information from one location to another, form one application to another. Process and sequence depend on integration.

SOA depends on transport of messages from one service to another. SOA is a way of implementing services that decouple application logic components and thereby facilitate rearrangement and reuse of software modules or objects. Once the software components have been decoupled, they need to be reconnected using messaging that passes transactions between the SOA components. The IBM mission critical WebSphereMQ is significant because it provides once and only once delivery of transaction messages in a secure manner. This provides the foundation of SOA.

SOA is a way of exposing information from a software module through an API, through an application interface. Once a service has a way of sending information to and from the services, the decoupled components can be re-coupled in different ways. In this manner, the messaging component is significant. There is no longer a single optimized stack, but rather independent components of a stack that may be re-coupled in any order using messaging.

Physical proximity of the components of the stack is no longer a necessity; the components can interact in different ways. Web services have a messaging capability called SOAP. Java has a messaging service called JMS. Both JMS and SOAP typically use IBM MQ messaging wrappers to provide assured delivery of information from one SOA service to another.

SOA engine markets depend on mature infrastructure middleware that provides the ability to consolidate integration modules with foundation architecture. IBM SOA is the software used most often in creating business integration foundation systems.

SOA creates a way to organize automated process supporting modules. SOA systems are evolving to support business flexibility by enabling integration of systems dynamically. Applications are being interconnected using integration to create cross-departmental processes. Processes are implemented in real time.

Process is sequence. Information is stored in databases, but it is used as process, process imposes sequence and flow. A sequence of events tied together with calculations and movement of information from one location to another, form an application. The ability to form a SOA collaboration from component repositories and move information from one siloed application to another is implemented as process flow. Process and sequence depend on integration and SOA systems in an engine, evolved to achieve the reuse of existing software code components.

SOA engines and SOA adapters and integration broker components comprise the SOA foundation product. The engine is implemented as a directory or database to control header and use of body information including date, updates, and location of scripts. The components are what are used to implement Web enabled applications.

Services Oriented Architecture (SOA) market license forecasts relate to growth of the middleware infrastructure. SOA markets at \$2 billion in 2007 are expected to reach \$9.1 billion by 2014. Growth comes from creating a way to reduce the cost of running an IT department by creating more automated process from software and freeing the budgets for investment in flexible response to changing market conditions.

## Companies Profiled

### Market Leader

IBM

### Market Participants

Applied Technology	Oracle /BEA
Tibco Software	Fiorano
FusionWare	IONA
Progress Software	SOA Software
Savvion	Tibco
Vitria	Software AG / webMethods
PolarLake	Hewlett Packard
Accenture	Aldon
Cape Clear Software	DataDirect Technologies
DataFlux Corporation	DataSynapse

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Exeros  
Francisco Partners / GXS  
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Informatica  
Iona Technologies  
Nexaweb Technologies, Inc.  
Pervasive Software  
Raining Data  
SAP  
Shunra  
Siperian  
SoftwareAG / webMethods  
Symphoniq  
TechTarget  
Torry Harris  
Wipro Technologies

Exaltec Software  
Extol International  
GigaSpaces Technologies  
IDS Scheer  
Information Builders  
Jacada  
Progress Software  
PolarLake  
Rogue Wave  
Serena Software  
Silver Creek Systems  
Skyway Software  
Tata Consultancy Services  
TBA Group / B2br:  
Tidal Software  
Vitria

# Services Oriented Architecture (SOA) Infrastructure Market Shares, Strategies, and Forecasts, 2008-2014

## REPORT METHODOLOGY

THIS IS THE 353RD 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 PARTICIPATION 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. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

## **Mission Statement:**

WinterGreen Research is an independent business research organization funded by sale of market research, competitive analysis, and return on investment studies all over the world. Research is conducted with integrity and independence that is supported by the revenue from the sale of studies by a distribution network. The company seeks to support its distribution network. The company is dedicated to its customers, to helping those customers grow and understand markets as the markets change and evolve. Automation of process is a central focus for the WinterGreen Research company.

Research is centered on new markets, evolving markets, and change in markets. Markets for new products depend on successful trials. Initial trials create a sounding board for a new product direction. Market growth for new products and services depends on completion of 100 successful trials with real paying customers. WinterGreen Research tracks those trials in various industries and the impact of the trials by talking to people.

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## Services Oriented Architecture (SOA) Engine Market Shares, Strategies, and Forecasts, 2008 to 2014

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**SERVICES ORIENTED ARCHITECTURE (SOA) COMPANY PROFILES**

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## ABOUT THE COMPANY

**WINTERGREEN RESEARCH**, IS AN INDEPENDENT RESEARCH COMPANY FOCUSING ON DETERMINATION OF MARKET SHARES AND MARKET FORECASTS OF SEGMENTS WORLDWIDE. THE COMPANY IS FUNDED BY THE DIRECT SALE OF STUDIES AND THROUGH A WORLDWIDE NETWORK OF DISTRIBUTORS THAT INCLUDES THOMPSON FINANCIAL, GLOBAL INFORMATION, MARKET RESEARCH.COM, AND RESEARCH AND MARKETS.COM. THE COMPANY HAS A RETURN ON INVESTMENT ANALYSIS TOOL BASED ON MODELS THAT REFLECT THE FEATURES AND BENEFITS OF A PARTICULAR PRODUCT OR SERVICES SET.

BUSINESS ROI MODELS ARE EVOLVED FOR A PARTICULAR PRODUCT SET. THESE WILL ARTICULATE THE COMPETITIVE MESSAGE IN ROI TERMS FOR THE PARTICULAR PRODUCT SETS AND SHOW THE FUNCTIONAL AND TCO ADVANTAGE OF PRODUCTS VS. COMPETITORS. THE MODELS ARE VERY USEFUL FOR COMMUNICATING THE PARTNER MESSAGE. A COMBINED SOFTWARE AND PARTNER SOFTWARE AND SERVICES SOLUTION CAN BE ARTICULATED AS A MARKETING MESSAGE IN THE MODELS. THE MODELS ARE A VERY SIGNIFICANT ASPECT OF THE OVERALL PARTNER PRESENTATION, PROVIDING THE CAPABILITY OF USING THE MODELS IN COMBINATION WITH A POWER POINT MARKETING MESSAGE TO BE USED FOR CLOSING THE SALE.

PARTNERS CAN USE A POWER POINT THAT REFERENCES THE ONLINE ROI TOOL SO THAT CUSTOMERS GET THE MARKETING MESSAGE IN A CLEAR AN CRISP MANNER ABLE TO BE PRESENTED WITHIN 10 MINUTES, AND YET HAVE THE GRANULARITY OF THE ROI TOOL SO THAT A POTENTIAL CUSTOMER CAN DIG INTO THE ROI NUMBERS IF THEY WISH BY BUYING A USER NAME FROM WINTERGREEN RESEARCH AND GOING TO THE WGR SITE TO GET THE NUMBERS INDEPENDENTLY OF IBM.

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THE ROI MODELS ARE GOOD AS A BASIS FOR THE POWER POINT PRESENTATION AND SO ALSO, IT IS GOOD THAT THE NUMBERS EXIST AND COME FROM A CREDIBLE INDEPENDENT SOURCE.

**WINTERGREEN RESEARCH**, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

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