

WINTERGREEN RESEARCH, INC.

**Application Server Market Strategies, Worldwide Shares  
and Forecasts, 2009 to 2015**

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**Application Servers Support Channel Chat**

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*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

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

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**CHECK OUT THESE KEY TOPICS**

**APPLICATION SERVER**  
**WEB SERVICES**  
**E-Commerce**  
**Cloud Technology**  
**Application Server Blogging**  
**Web 2.0**  
**Wiki-Style Collaboration**  
**Social Networking**  
**Business Process Management**

**Virtualized Systems**  
**Open Source Application Server**  
**Web Assets**

**JBoss**  
**SOA REUSABLE SOFTWARE COMPONENTS**  
**VIRTUALIZATION**  
**SERVER HOSTING CENTERS**  
**WEB PROPERTIES**

**Web Application Gallery**  
**Web PI**  
**Collaboration**  
**Mashups**  
**Salesforce.com**  
**Web services**  
**Web Analytics / Frameworks**

***OPPORTUNITY ABOUNDS***

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## **Application Server Market Strategies, Worldwide Shares and Forecasts, 2009-2015**

**LEXINGTON, Massachusetts (August 28, 2009) – WinterGreen Research announces that it has a new study on application servers. The 2009 study has 611 pages, 244 tables and figures. Worldwide markets are poised to achieve significant growth as application servers continue to benefit from the enterprise need to build out e-commerce sites that support a brand.**

**Application servers are used to build a Web page and shopping cart for e-commerce. Application servers offer e-mail, chat, and phone for personalized web reach of product displays and shopping carts. Retailers can use application servers to manage e-commerce and service interactions over the Web using tools that support one continuous relationship. This expansion of application server capability vastly improves the reach of e-commerce sites.**

**Application servers are used for blogs and Internet communications around e-commerce. Developers use efficient automated process to drive new advertising and shopping cart capabilities. Cloud computing application servers to be used for e-commerce. Application servers are used for achieving a capability whereby applications can be built without programming, forcing a dramatic change in application servers.**

**The aim of e-commerce is to achieve an ever increasing customer base, customer retention, improved customer services, and cross selling. These new application server features facilitate that. Manufacturers need the same features to improve the functioning of the supply chain. Service interactions over the Web use features that facilitate the design, inventory management, distribution, and shipment processes.**

**The two distinct categories of application server are commercial grade mission critical systems and business class open source / Microsoft application servers. Commercial grade mission critical systems are significantly more expensive than the open source and Microsoft systems. Commercial grade mission critical systems support a high degree of complexity that is not needed in many Web site development situations. Microsoft Systems are virtually free to the user as the IIS is bundled with the operating system.**

**A move towards application server signals a fundamental shift in how information is handled. The prospect of digitizing much of the world's information and making it searchable poses the prospect of a quantum increase in the quantity of information available; an increase by a factor of 1,000. At the most basic level, application servers work on the cloud scale contemplated to change the world.**

**IBM WebSphere message broker complements the IBM WebSphere application server features to address key business environment challenges. Businesses have a diverse suite of applications that have been developed or acquired over a number of years, perform key business functions, and represent much of an enterprise's intellectual capital and business advantage. The breadth of the applications in a typical enterprise is significant. Applications run on a diverse range of platforms, with many different data formats and information exchange protocols.**

**SOA business integration foundation systems are a central aspect of application servers. IBM has consolidated its leadership position in SOA by providing integration software that is useful in reusing code. The ability to consolidate integration modules that perform useful platform capabilities provides a foundation architecture for building applications from existing modules of code. IBM SOA is the defacto industry standard software used in creating business integration foundation systems, leveraging a 70% share in SOA.**

#### **Application Server Key Benefits**

- Increase in channel productivity**
- Automation of transaction processing systems**
- Implementation of SOA**
- Quick response to changing market conditions**
- Elimination of manual processes**
- 100% payback within one year**
- Significant decreases in materials purchasing**
- Significant decreases in inventory costs**

**Manufacturers need the same features to improve the functioning of the supply chain. Service interactions over the Web, e-mail, chat, and phone facilitate the design, inventory management, distribution, and shipment processes.**

**The two distinct categories of application server are commercial grade mission critical systems and business class open source / Microsoft application servers. Commercial grade mission critical systems are significantly more expensive than the open source and Microsoft systems. Commercial grade mission critical systems have a high degree of complexity that is not needed in may Web site development situations.**

**When banks and very large retail organizations are managing thousands of transactions per second from a globally integrated enterprise trying to protect a brand, the commercial grade systems from IBM, Oracle, Fujitsu, and ATG among others are needed. For the millions, soon to be billions of Web sites that support blogs and more simple transaction systems, a simpler system is preferable such as those from Microsoft, Novell, and Red Hat.**

**IBM WebSphere application server provides availability and security. Business depends on using the Internet to optimize cost. Reducing application infrastructure costs is achieved by the automation of process. WebSphere application server is used to build, deploy and manage robust, agile and reusable SOA business applications and services.**

**IBM WebSphere Message Broker provides features to address key business environment challenges. Businesses have a diverse suite of applications that have been developed or acquired over a number of years, perform key business functions, and represent much of an enterprise's intellectual capital and business advantage. The breadth of the applications in a typical enterprise is significant. Applications run on a diverse range of platforms, with many different data formats and information exchange protocols.**

**Knowledgeable workers use application servers to help focus energies on high-value activities, driving new efficiencies, spending as little time as possible seeking and wading through information. The systems are used to automate the processes responsive to Internet channel transactions.**

**An enterprise-wide application server is useful for displaying html pages dynamically and conducting business on the Internet. Suppliers improve sensing, analytic and workflow capabilities by radically streamlined the way customers access and act on information.**

**Balancing growing online channels with slowing growth in traditional channels is an universal marketing issue in the age of the Internet. Making all customer channels work better together, gaining market share and reducing costs are central concerns. The bulk of online sales growth is derived from existing online shopper customers spending more online.**

**A move towards application server signals a fundamental shift in how information is handled. The prospect of digitizing much of the world's information and making it searchable poses the prospect of a quantum increase in the quantity of information available; an increase by a factor of 1,000. At the most basic level, application servers work on the cloud scale contemplated to change the world.**

**Companies are charged with keeping existing customers loyal and learning to upsell. Sales and coupons work online as well as in traditional marketing. Increasingly savvy and demanding online consumers are keeping competition high. Platform-neutral e-commerce optimization services are able to deliver a unified, personalized, and satisfying customer experience. Interactions are conducted over the Web presentations and shopping carts supplemented by phone calls, chat, mobile devices. Systems connect to stores using application servers to one continuous, ongoing relationship, rather than disconnected conversations.**

**Users get a transparent view of application performance, reliability and scalability. Extensive testing can be done before going into production. Users can test multiple architectures, variables, components, and configurations easily and independently. To proceed to deploy in the cloud, developers can push the debugged test environment live in a few simple steps.**

**Application server are being expressed as software fur e-commerce companies participate in the market. Application servers are used to support changes to code, using a syntax in place of a programming language, making systems more flexible. Automated process that is rigid is not supportive of competitive advantage. SOA Web services are being used in application server systems to permit flexible response to changing market conditions. Virtualization is another aspect of application server systems driving markets.**

**Real time analysis of information is being used to position companies to achieve competitive advantage. Application servers are a central aspect of the BPM initiative, providing up to date information in a usable format. Companies are implementing BPM solutions in the context of application server that provides syntax to business users.**

**According to Susan Eustis, lead author of the study, “innovation drives application server market growth in every industry, and innovation depends on implementation of automated business process in every instance. Application servers represent a way to give enterprises, small and mid size businesses a market presence. E-commerce is at the center of a globally integrated enterprise.”**

**IBM is able to leverage its application server market dominance to support innovation, providing software that supports flexible response to changing market conditions. Application servers are complemented by SOA to reach into every industry and every segment of the economy via cloud computing. SOA drives innovation for the very large enterprises. Mid range size companies and very small organizations are adopting technologies similar to what the enterprise use, creating automated process to replace manual process.**

Application server markets at \$2.3 billion in 2008 are expected to reach \$4.3 billion by 2015. Retailers can manage e-commerce and service interactions over the Web, e-mail, chat, and phone as one continuous, personalized relationship. This expansion of application server capability vastly improves the reach of e-commerce sites. The aim of e-commerce is to achieve an ever increasing customer base, customer retention, improved customer services, and cross selling. These new features facilitate that.

## Companies Profiled

### Market Leaders

IBM  
Oracle / Sun / BEA  
Fujitsu  
Microsoft  
Red Hat  
Novell  
Adobe  
Art Technology Group

### Market Participants

#### Selected Application Server Company Profiles

Hewlett Packard (HP)  
Host Bridge Technology  
Workday / Cape Clear  
Research In Motion (RIM)  
SAP CRM  
Zeus Technology, Ltd.

## Application Server Market Strategies, Worldwide Shares and Forecasts, 2009-2015

### REPORT METHODOLOGY

THIS IS THE 415TH 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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## Application Server Worldwide Strategies, Market Shares and Forecasts, 2009 to 2015

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