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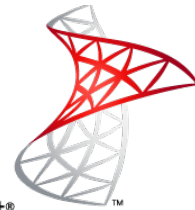
Implementing your Next-generation Integration Platform

Integration with BizTalk Server 2010

Introduction

Applications do not live in isolation; they are very much inter-connected with other applications, systems and business processes in the enterprise. Most large organizations today typically work in a fairly heterogeneous environment with disparate systems. Connecting the systems and applications sitting across the diverse platforms and tying them to the business processes has become one of the top priorities for most organizations. As they continue to evolve towards a cloud strategy—to take advantage of the economic and scale benefits—the need to have a robust Integration Platform escalates.

With over 10,000 customers, BizTalk Server supports these goals. BizTalk Server allows connecting diverse applications, as well as creating, executing, and monitoring process logic that uses those applications. It not only helps organizations to create better automated business processes within the organization but also allows extending that reach out to Trading Partners and Suppliers. With the new “AppFabric Connect” feature in BizTalk Server 2010, the boundaries of integration are extended even further. Now, in a few simple steps, one can expose the existing Web Services orchestrated on BizTalk Server 2010 into the Cloud. This allows new and existing customers



Microsoft®
BizTalk® Server 2010

of BizTalk Server 2010 to take advantage of the new economic benefits offered by the Cloud: reduced management, faster time to market, increased productivity, etc. These advantages scale out to unprecedented levels on an as-needed basis. In an era where business environments are changing every day, BizTalk Server 2010 offers a tremendous opportunity for customers to make significant shift in the way they do business to maximize their benefits and profitability while maintaining an optimized cost structure.

This paper outlines some of the emerging trends in integration, and outlines how you can start taking advantage of them today.

Featuring research from



Business Imperatives for Integration

- Capitalizing on low cost solutions - In the current economic climate, the cost pressures have spurred businesses in every industry to find ways to do “more with less”. In addition to pursuing initiatives to minimize operating costs, businesses must also invest in infrastructure that delivers a tangible return on investment and supports future growth. Organizations of all sizes need to significantly cut costs by automating core business processes, enabling faster, more productive communication and collaboration across lines of business, and gaining real-time insight into operations. They also need to accelerate their system integration and application development projects so that they can extract more value from existing resources and quickly roll out new applications to address key business issues.
- Inefficient Processes - In the current business environment, we cannot be successful by running inefficient processes that are associated with high manual labor costs. Companies need to have a robust and scalable business model with a strong focus on reducing labor costs. Process automation is one of the most effective methods for increasing efficiency, because it eliminates the need for manual data processing. This boosts productivity across the organization and reduces potentially costly errors associated with double entry and process duplication. And, by freeing up employees to focus on information synthesis and analysis rather than data entry tasks, businesses can dramatically improve the quality of their output even as they increase production capacity. This also enables getting increased visibility into those processes to track efficiency across both human and system workflows. This then provides consolidated data that can be used to quickly assess performance across departments, business units and locations.
- Inconsistent Information - Most enterprise customers today have many disparate systems, each with its own proprietary formats, messages and schemas. Information in these systems can be highly inconsistent. For example, you may receive an order through your CRM (Customer Relationship Management) solution but your ERP (Enterprise Resource Planning) system may not know about it in real-time and this causes inconsistency in the information. This may lead to companies selling more than they can deliver in time. This can result in high inventory levels,

cutting down the profits margins. By using integration solutions to link legacy applications with their core infrastructure components, companies can avoid costly “rip and replace” projects while simplifying access to critical data. This helps companies strategically allocate IT resources to support revenue-generating initiatives and dramatically reduce outlays in time and money required for IT system overhaul projects. In addition, by integrating legacy applications, companies can improve connectivity and throughput in their business operations while maintaining data consistency.

- Lack of Business Agility- Business environments change every day. In recent years we’ve seen many large economies tank, leading to a swath of mergers and acquisitions. Many others had to cut costs by laying-off staff and some changed their business priorities and/or business models. New industry standards are being introduced, new compliance requirements are being pushed by government, and new technologies are being introduced every year. Businesses need to be agile to respond to these changing requirements. To be able to survive, companies need to gain a competitive edge through increased agility.

About Microsoft’s Value Proposition

- Total Cost of Ownership Leadership - Microsoft BizTalk Server 2010 helps organizations of all sizes to significantly cut costs by automating core business processes, enabling faster, more productive communication and collaboration across lines of business, and expanding real-time insight into operations. With more than 30 built-in adapters, BizTalk Server accelerates system integration and application development, so companies can extract more value from existing resources and quickly roll out new applications to address key business issues. BizTalk Server 2010 is one of the lowest-priced, end-to-end enterprise application integration solutions on the market, offering a complete set of features and tools at significantly less cost than competing solutions.
- Global Reach and Ecosystem - Many companies already employ IT staff members with substantial experience managing systems that run on Windows and developing applications based on the .NET Framework, which makes it easy to work with Microsoft BizTalk Server 2010 and related technologies. Companies

can take advantage of the broad developer ecosystem needed to support development projects. Companies can take full advantage of existing IT skills, including familiarity with the Microsoft .NET Framework development environment, to reduce hiring and training costs. In addition, companies can tap the deep industry expertise of Microsoft partners to quickly enhance and extend applications.

- Smarter business processes on a single platform - Businesses can save cost by leveraging current investment in the Microsoft stack, taking advantage of its breadth of functionality and seamless integration with other Microsoft software and technologies. So for example, enterprises with existing investments in SharePoint can make smarter business processes by teaming up BCS (Business Connectivity Services that is part of the SharePoint Foundation 2010) and BizTalk Server 2010 together. This powerful combination allows the great client experience offered by SharePoint and a robust backend integration solution offered by BizTalk Server 2010.

- Rich Integration and Interoperability - One of the distinguishing features of BizTalk Server 2010 is the number of adapters that Microsoft ships in the box (free of cost). These adapters allow rich integration and interoperability with the rest of the systems in the enterprise. A mature product on its seventh release, BizTalk Server 2010 can help companies gain solid competitive advantage through increased agility. Companies can use industry accelerators, for example, to speed development of new functionality to meet business requests in less time, and to exploit new market opportunities ahead of competitors. BizTalk Server can also reduce the complexities and risks associated with administering a network of disparate systems that expand through mergers or acquisitions. Built-in adapters simplify the process of linking heterogeneous systems. This helps companies more effectively manage change.

Solution Profiles

To illustrate some of the tremendous benefits of this approach, let's briefly review two examples of new composite application business solutions building upon next-generation integration platform.



"Without Windows Server AppFabric we would not have been able to use a service-oriented architecture ... AppFabric was the enabler of the service-oriented solution we needed to create. "

Dr. Ralf Hoelper, Director IT, Jettainer

Air Freight Container Firm Tracks 12 Million Moves a Year with Next-Generation Solution

Whenever a jetliner takes off, its luggage and other cargo is stored in specially constructed containers called unit load devices (ULDs). Jettainer, based in Raunheim, Germany, manages 80,000 ULDs for a customer base that includes some of the largest airlines in the world. The logistics of getting the right ULDs located at optimal levels at more than 500 airports around the globe are challenging. Jettainer, working with Microsoft Gold Certified partner Daenet, created a solution for managing the company's 12 million ULD moves a year. Based upon a new Microsoft-based Service Oriented Architecture using BizTalk Server and Windows Server AppFabric, this new composite application solution gave Jettainer the services hosting solution it needed, helped the company cut development time significantly, and linked back-end systems to enable a better view into operations.



"Looking just at software maintenance—not considering the mainframe licensing and personnel costs—we anticipate a 70 percent reduction in operational costs from using AppFabric."

Philippe Lacroix, Chief Technology Officer, Expertime

70 Percent Cost Reduction as Windows Server AppFabric and BizTalk Server Replaces Mainframe Solution

When JM Bruneau, a French supplier of office furniture, needed to replace the mainframe-based IT infrastructure that supports the company's U.S.\$450 million in annual sales, it turned to Expertime. Expertime designs and develops enterprise application and infrastructure solutions for leading organizations including France Television, Carrefour, Nestlé Waters, and Bank of France. Expertime created a new composite application based upon service-oriented architecture principles using Windows Server AppFabric and BizTalk Server. When fully deployed, Expertime estimates that the new composite application solution will help JM Bruneau reduce its operational expenses by 70 percent compared to continued support for its legacy mainframe solution, while providing its call center agents with a better view of customer needs.

Beginning Your Journey to the Cloud

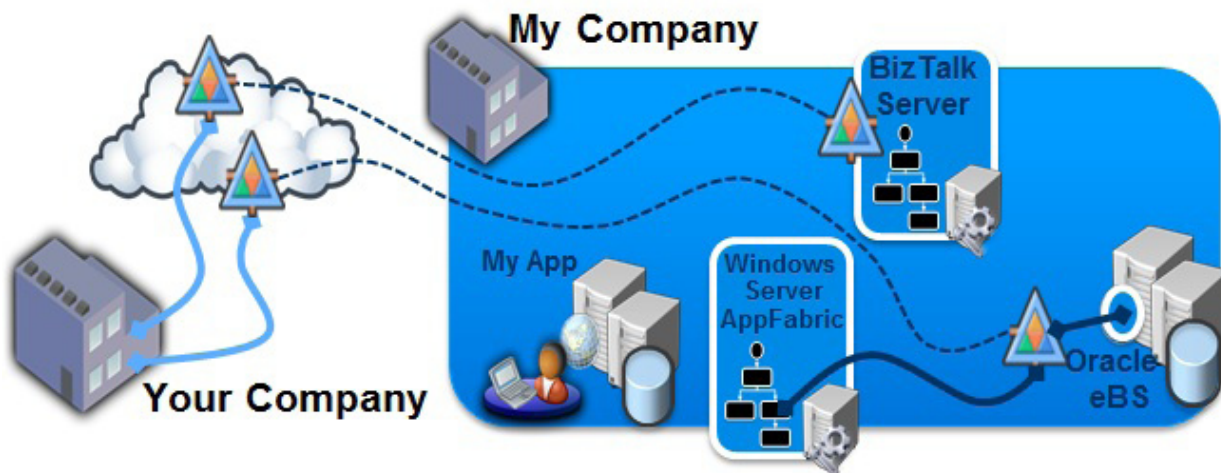
BizTalk Server 2010 has a new feature called “AppFabric Connect” that enables organizations to quickly build a web service on top of existing LOB applications (such as Oracle eBS and SAP), translating the complex and inconsistent APIs from these systems into web services. These services can then be accessed by other applications in the organization in a simple and standard way. Combining the power of the Windows Azure AppFabric Service Bus with BizTalk Server 2010, the new Wizard creates a connection between a service endpoint that lives in the cloud and the implementation of the service that lives on-premises. It does this securely and without requiring any additional infrastructure, firewalls or complex networking in place. All you need to do is provision a service endpoint in the Service Bus and plug this into the BizTalk Adapter Wizard.

This makes it so easy to extend your internal integration processes to your customers and partners as web services that “seem” to live in the cloud, but lets you maintain control using your on-premises infrastructure.

The “AppFabric Connect” feature also enables organizations to use BizTalk capabilities from Windows Server AppFabric. For Windows Server AppFabric, the focus is to enable developers to leverage the power of the BizTalk LOB Adapters and the BizTalk Mapper from inside Windows Workflow applications.



FIGURE 1 BizTalk Server AppFabric Connect



Source: Microsoft

Conclusion

Microsoft BizTalk Server 2010 is one of the most robust integration platforms available in the Industry today. It is designed to connect people with the processes and information that needed to effectively manage and grow your business. With proven flexibility and unsurpassed ability to execute, BizTalk Server 2010 provides a single, scalable solution that can be used to build end-to-end applications. In addition to offering EDI (Electronic Data Interchange) and built-in device integration capabilities, BizTalk Server 2010 also

offers several adapters and industry accelerators out of the box. The new "AppFabric Connect" feature in BizTalk Server 2010 allows extending your connectivity from your premises to the Cloud in simple easy steps. Cloud capabilities can transform existing businesses to a scale that was previously unimaginable. Companies can use these tools today to increase business process efficiency, boost productivity, and strengthen agility, helping reduce costs while optimizing infrastructure for future growth.

Source: Microsoft

Research from Gartner

Magic Quadrant for Application Infrastructure for Systematic Application Integration Projects

Products that provide support for integration require a set of features that ranges from robust messaging to support for B2B protocols. This Magic Quadrant examines vendors whose products provide features that address the needs of systematic A2A, B2B and cloud-based application integration projects.

WHAT YOU NEED TO KNOW

This document was revised on 22 October 2010. For more information, see the [Corrections](#) page.

Application integration is getting applications that were designed independently to work together. Most everyone in IT understands the challenges created by stand-alone, stovepiped applications. Consequently, virtually every software project that deploys a new application involves application integration tasks.

The part of the application infrastructure market focused on integration products for application-to-application (A2A), B2B and cloud-based application integration will undergo consolidation, because multiple product features are used across each of the project types. Many users are looking to support their integration projects with an integrated suite provided by one vendor, thus eliminating the burden to act as a system integrator for application infrastructure. To address this, even market-leading vendors have more work to do to complete modernization and consolidation of the technologies to support these types of integration projects, and to secure long-term retention and the long-term retention of their market shares in an economic environment that is driving organizations to implement extensive cost-cutting measures.

This Magic Quadrant focuses on support for systematic integration projects that span internal, B2B and cloud applications, data and interfaces, particularly for projects that include long-term consideration and project planning in the process of design and technology selection for interfaces. The IT projects addressed by solutions and vendors evaluated in this Magic Quadrant target integration interfaces that are intended for an extended period of use, carry advanced

service-level requirements and typically have an impact on the overall information context of the business organization. These are distinct from opportunistic projects that are undertaken in response to urgent demands and target interfaces of limited life, responsibility and complexity. Opportunistic projects value time to market and cost optimization above the long-term use and flexibility of the interface. Here, we focus only on the systematic project types, in part because opportunistic projects rarely focus on selection of the integration infrastructure, but focus instead on using the approach and technology that yield the least-expensive interface in the shortest time.

In this Magic Quadrant, we examine a market where buyers (IT projects) are looking for application infrastructure technology to fulfill the end-to-end requirements of a systematic application integration project. For each competing vendor, we evaluate how well that vendor's portfolio of application infrastructure offerings fulfills the requirements of such projects. The evaluation of a particular vendor is based on the premise that the vendor is the sole provider of the complete, end-to-end set of requirements for this project type.

Gartner offers analysis of application infrastructure for two additional project types. One analysis is for systematic, service-oriented-architecture (SOA)-style application projects. This is the type of project where the effort centers on the modeling and design of an SOA-style application topology, and the development of service implementations and user-facing logic (which is often multichannel). The orchestration of new and pre-existing like and unlike services is a key requirement (including some degree of SOA-style integration and governance). If your project, while implementing the strategic SOA backplane and governance for your organization/domain, is also intended to make decisions or provide recommendations about the tooling for supporting the implementation of SOA applications.

Additionally, Gartner offers analysis of technology vendors for systematic SOA interoperability infrastructure projects. Those projects are usually driven by the organization's SOA center of excellence (COE), and typically consists of the architecture, design, implementation and deployment of two macrocomponents – the SOA backplane and SOA governance – that can be implemented at different times for convenience, though they are designed as an integrated, enterprisewide (or domainwide) SOA. SOA-enabling infrastructures are meant to be shared by virtually any SOA application project in the enterprise (or domain).

MAGIC QUADRANT

Market Overview

Application integration technology burst into the middleware market in the mid-1990s. At that time, sophisticated integration products were offered exclusively by specialists. The term “specialist” was used to characterize vendors whose products and services are limited to providing application infrastructure (a characterization that remains true today). Initially termed “message brokers,” the products from these vendors focused on providing a graphical approach to specifying the business logic required to transform and intelligently route data among applications.

From 1999 to 2001, IBM and Microsoft entered the application integration market, where they have since been joined by Oracle, SAP and Fujitsu. These vendors are often referred to as “megavendors.” The term is used to characterize large vendors that provide products and services whose applicability extends well beyond that of application infrastructure.

Gradually, both types of vendors expanded the features provided in conjunction with the broker to the point of becoming an integrated suite. During this time, the popularity of SOA applications began to grow, and enterprise service bus (ESB) technology designed to mediate interactions between clients and services was introduced. The products offered by ESB vendors evolved in the same manner – adding features (in the form of services) that resulted in an integrated suite. Due

FIGURE 1 Magic Quadrant for Application Infrastructure for Systematic Application Integration Projects



to changing consumer buying practices and the increasing functional overlap that resulted as ESB and integration suite products moved toward one another in terms of features, the markets merged.

Today, megavendors' offerings have reached feature parity with specialists' offerings. Therefore, although specialists continue to outmaneuver megavendors through innovations in business process management (BPM) tools, business activity monitoring (BAM) features and complex-event processing (CEP) capabilities, megavendors are countering by sowing fear, uncertainty and doubt about smaller vendors, by matching the innovation of specialists through internal development or acquisition, and by expanding sales to include a broad set of assets that is complementary to application infrastructure (such as solutions, services, patterns and templates), and that add significant value to organizations involved in SOA, BPM and CEP initiatives.

Meanwhile, as the popularity of application integration rose, so did the interest in B2B collaboration. Companies disenchanted with the cost of that era's private, proprietary electronic data interchange (EDI) value-added network (VAN) services began seeking software alternatives that provided secure, message-based transport over TCP/IP networks, including the Internet. Thus emerged the market for B2B gateway software, until recently addressed by the "Market Update for Business-to-Business Gateway Software Vendors."

Until the last few years, IT users tended to implement integration projects for A2A and B2B projects; however, in the last few years, users have increasingly been looking for a consolidated integration solution to both problems. Thus, three important trends drove the consolidation of both A2A and B2B integration project styles onto this revised version of the application integration Magic Quadrant:

- Application infrastructure vendors have extended their portfolios to include products that support B2B collaboration.
- Vendors of B2B collaboration products are extending their portfolios to include products that support A2A integration.
- Enterprises are consolidating disparate B2B integration and application integration initiatives. This includes the consolidation of technologies, best practices and governance.

Market Definition/Description

Application integration is defined as "giving applications that were designed independently the ability to interoperate." In 2008, Gartner republished a seminal paper identifying three integration styles: data consistency, multistep process and composite application integration.

The objective of data consistency integration is to make data across all applications consistent. For example, if a customer changes a billing address in a CRM application, that event is pushed out to other applications (for example, accounting, billing and ERP) so that those applications can update their databases with the most current data.

Multistep process integration entails orchestrating the execution of the activities of a business process, regardless of whether those activities are performed by software (applications or services), humans or even intelligent devices

in a manner that automates the flow of execution through instances of that business process. Comprehensive support for multistep process integration entails supporting multiple styles of business processes, including system-to-system, human-to-human, collaborative, document-centric and administrative.

Composite applications, the third style of integration, are growing rapidly as organizations seek to leverage established assets (including the services created using SOA) and to minimize the amount of new code that must be developed and maintained.

Initially, data consistency and multistep process integration styles were applied for internal, A2A integration and B2B integration. Today, the challenge of integrating applications also includes integration with cloud-based applications.

Historically, B2B and A2A integration have been considered separate practices conducted by separate groups. However, at the technology level, B2B integration technology has much in common with middleware for A2A integration, including communications, transformation, adapters and orchestration features. For that reason, organizations are shifting toward establishing best practices that create a unified approach for A2A and B2B integration.

This Magic Quadrant emphasizes the product capabilities most relevant to projects that have as their primary objective applying the above styles to:

- Integrate applications deployed on-premises and externally (at trading partners or "in the cloud").
- Create business services and business object services using existing assets.

These projects deliver increased cohesion and unified access to resources of purchased packages, enterprise legacy products and applications that are new and custom-designed from other relevant enterprises, or that are provided by service providers. Once again, the goal of systematic application integration projects is to acquire as many technical capabilities as possible from a single vendor.

In this Magic Quadrant, we have evaluated 27 vendors. Some vendors that were not included may be suitable for projects in particular geographies or vertical markets.

This Magic Quadrant reflects consolidation:

- IBM acquired Cast Iron Systems and Sterling Commerce.
- Oracle acquired Sun Microsystems.
- SAP acquired SOAlogix.
- Tibco Software acquired Foresight and Proginet.

At the same time, new vendors like Red Hat JBoss, MuleSoft, Sopera and WSO2 have emerged that target the low end of the application integration market using the business model of providing support and maintenance for and extensions to open-source technologies.

To succeed in the modern business-computing environment, organizations must have the flexibility to experiment and innovate, while preserving the overall integrity and quality of service of their core systems. To achieve this, most enterprises are engaged in two kinds of projects:

- Systematic: Designed to advance the core enterprise-computing capability
- Opportunistic: Designed for projects with a less-formal approach to design, review, testing, documentation, etc. The product and vendor evaluations in this Magic Quadrant can be used to select products for both project types, but the evaluation criteria are most heavily weighted toward supporting systematic projects, because of the broad set of product features that reflects the vendors' holistic views of enterprise application infrastructure.

Inclusion and Exclusion Criteria

To be assessed in this Magic Quadrant, vendors must provide – either in the form of multiple products (whether or not framed in a suite) or as a single integrated product – the following key capabilities:

- Classic integration services – Common services for data consistency, multistep processes and composite application integration, including messaging, bulk data movement (for example, managed file transfer [MFT]), transformation, flow management, adapters and process integration packs (PIPs).

- Multienterprise integration support – Functionality that supports conveying business transactions electronically between any two companies among members of a B2B community (such features also have relevance in large organizations – for example, between different divisions) or between on-premises and cloud-based applications.
- Development and deployment environment – A graphical environment for specifying the interfaces and technologies required to implement data consistency and multistep process styles of integration.
- Management – System monitoring and management features that keep IT infrastructures running at peak efficiency at all times by enabling the remote monitoring and management of distributed applications, services and information sources, and by enabling the automated resolution of predefined conditions and events.

Inclusion in this Magic Quadrant is also based on an assessment of the fit of a vendor's complete portfolio of application infrastructure offerings with the requirements listed above. We make this selection based on the real-world use patterns and technology content of the vendor's offerings. The vendor must have a strongly competitive offering in key capabilities, but it must also offer useful capabilities in the following technical areas:

- Data integration services – Functionality that is used to establish common access to data sources (structured and unstructured), improve data quality or federate data from multiple sources.
- SOA support – Features required for deploying SOA and event-driven architecture (EDA), including an ESB, a registry, and support for multiple deployment strategies and policy management.
- BPM support – Tooling manages the execution of activities in a business process, regardless of whether those activities are performed by humans, programs or even intelligent devices, in a manner that automates the flow of execution through that process.

- CEP – Functionality that extracts the information value from multiple input base events, and generates summary-level complex events that provide insight into current and future business conditions.
- BAM – Functionality that provides real-time access to critical business performance indicators to improve the speed and effectiveness of business operations.

Added

- GXS
- MuleSoft
- Red Hat JBoss
- Sopera
- WSO2

Dropped

- BEA Systems: Acquired by Oracle on 29 April 2008
- CapeClear: Acquired by Workday on 6 February 2008
- Iona: Acquired by Progress Software on 25 June 2008
- PolarLake: Switched from general integration to specializing on reference data distribution
- Sun Microsystems: Acquired on 27 January 2010 by Oracle
- WebMethods: Acquired by Software AG on 5 April 2007

Evaluation Criteria Ability to Execute

A detailed description of the Ability to Execute criteria can be found in Section 2.3.2 of “Magic Quadrants and MarketScopes: How Gartner Evaluates Vendor.”

Application integration projects are typically driven by experienced architects and engineers working for a COE. When selecting products, they look for the best suite of technologies from a functional standpoint, and for good integration among the component parts to minimize development and operational costs. Additionally, they look for reliable and widely proven products in their

geography and industry sector, and favor vendors that can demonstrate the ability to execute in these realities with successful and proven case stories and references.

Given the presence in this market of software behemoths like IBM, Oracle and Microsoft, it is critical for vendors to have outstanding and focused execution of their marketing plans to be able to have their message heard by prospects and clients. Therefore, a vendor’s product/service excellence (in terms of the offering’s functional completeness and maturity, and the degree of integration of the individual components), marketing execution and customer experience are especially critical to success in this market. Consequently, these criteria are weighted more highly than other Ability to Execute criteria. Viability, sales execution/pricing, marketing responsiveness and track record and excellence in operations are also important evaluation criteria for execution, but no more than in any other market.

To rate vendors’ ability to execute for the product criterion, we considered the same characteristics in each of the three application infrastructure Magic Quadrants. Across the three Magic Quadrants, the evaluation of these characteristics is weighted equally in determining the final product rating, because they are independent of the specific requirements of the project types addressed by the Magic Quadrants. This is the list of technical features and capabilities considered for this and the other related application infrastructure Magic Quadrants:

- Offer completeness: Evaluates the extent to which the vendor’s application infrastructure offering currently supports the full range of technical features and capabilities listed below in the Completeness of Vision section.
- Offer maturity: Evaluates the maturity of the offering in terms of its longevity in the marketplace, architectural stability, installed base and proven ability to support the requirements of the application infrastructure markets for business-critical scenarios.
- Offer extensibility: Evaluates the ability of the platform to easily, quickly and effectively incorporate new standards, technologies, and acquired and third-party products in terms of the platform technology and internal architecture, as well as the vendor’s track record in extending its offering.

Table 1 shows the weighting used for each criterion.

Completeness of Vision

A detailed description of the Completeness of Vision evaluation criteria can be found in Section 2.3.1 of the “Magic Quadrants and MarketScopes: How Gartner Evaluates Vendor.”

Most enterprises realize that applications no longer stand alone, and that engaging in an application integration project will be required nearly every time a new application is deployed. Infrastructure supporting application integration will require refinement and extension as new requirements (e.g., the consolidation of B2B and cloud/software-as-a-service [SaaS] integration with on-premises application integration) emerge and the organization’s application portfolio grows. Therefore, users favor vendors that not only can provide the proven and reliable set of functionalities needed to address current requirements, but also vendors that can present a credible road map for the evolution of their application infrastructure offering to address emerging standards (e.g., service component architecture [SCA] and OSGi Alliance), technologies (e.g., CEP, mobile device support) and usage scenarios. This is the reason why for this market we weight Completeness of Vision criteria like market understanding (that is, the ability to anticipate user requirements and competitor challenges), product strategy and innovation higher than any other. Sales, vertical/industry and geographic strategies are also important to succeed in this market, but no more so than in other markets, given that experience shows that the many application integration products have proved successful in multiple industry sectors and geographies.

To rate vendors’ Completeness of Vision for the product criterion, we considered the same technical features and capabilities in each of the three application infrastructure Magic Quadrants in terms of their current form and planned evolutions. However, for each Magic Quadrant, the evaluation of the different features and capabilities is weighted differently in determining the final product rating to reflect the specific requirements and priorities of the particular types of projects the Magic Quadrant refers to. This is the list of technical features and capabilities considered and their weight for this Magic Quadrant:

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	standard
Sales Execution/Pricing	standard
Market Responsiveness and Track Record	standard
Marketing Execution	low
Customer Experience	high
Operations	standard
Source: Gartner (October 2010)	

- Back-end containers (weight: none): Features and capabilities to support the execution of mainstream SOA-style, custom-built back-end business logic (i.e., basic server application container features such as programming frameworks and languages, runtime interpreters and virtual machines [Java Virtual Machine or similar], interoperability and access from like and unlike platforms, management, quality-of-service support and other like capabilities). It may also include support for leading-edge and high-demand SOA-style, custom-built back-end application logic (i.e., extreme transaction processing, event processing, parallel processing, support for multitenant deployments of applications as a service, footprint optimization, unintrusive versioning and other capabilities).
- SOA modeling, design and composition tools (weight: medium): Features and capabilities to support SOA-style modeling, design and development, including separation of front-end and back-end business logic, design of service interfaces, metadata management, choice of SOA patterns (remote procedure call [RPC], event-driven architecture [EDA], Web-oriented architecture [WOA]), service composition and mediation, productivity aids and other capabilities.

- Front-end containers (weight: low): Features and capabilities to support the execution of SOA-style, user-facing front-end business logic in a multichannel environment (i.e., supporting a choice of front-end architectures, such as traditional rich client, traditional Web client, rich Internet client, Ajax, mobile, portal and/or others), and its ability to access SOA-style interfaces of like and unlike platforms.
- SOA governance (weight: low): Features and capabilities to support the implementation of SOA governance processes, with specific reference to the following aspects:
 - SOA policy management and enforcement
 - Registry/repository and metadata management
 - Statistical and key performance indicator (KPI) data collection
 - Governance of services in the cloud
 - Monitoring and management
 - Application and service life cycle management
 - Interoperability with other SOA governance technologies
- Core ESB (weight: high): Features and capabilities to support core ESB capabilities, including reliable communication between endpoints through a variety of protocols, support for fundamental Web and Web services standards, the ability to bind between consumer and provider endpoints, the ability to apply optional intermediary functions (e.g., transformation and routing) to messages in flight, and messages for which the contents are explicitly defined and documented.
- Advanced ESB (weight: high): Features and capabilities to support capabilities like reliable communication among on-premises, B2B or cloud endpoints through a variety of protocols, strong external partner community management, and internal proprietary and B2B standard messages and security, including in-flight and at-rest message encryption and demilitarized zone (DMZ)-based, reverse-proxy servers.
- Orchestration (microflow, service composition and straight-through process) design and execution (weight: high): Features and capabilities to support application composition, including design tools and execution engines for supporting the implementation of microflow, service composition and straight-through processes (human-centric workflow is not required).
- Message/data schema/mapping (weight: high): Features and capabilities to support message/data schema management and mapping. This includes support for document and messages in canonical formats (e.g., XML, EDI, industry standard formats [such as HL7, SWIFT, ACORD, RosettaNet and others], Web Services Description Language [WSDL], etc.), availability of a metadata repository for storing documents and message formats (for storing and browsing), and a mapping tool to translate and convert messages from one format to another.
- Adapters (weight: high): Features and capabilities to support adapters for packaged applications, database management systems (DBMSs), message-oriented middleware (MOM), application servers, transaction processing monitors, standard and proprietary A2A and B2B protocols, cloud/SaaS APIs, and other application and technology environments.
- External partner community management (weight: medium): Features and capabilities to support external partner community management, which facilitates in the provisioning, configuration and master data management of adapters, communication protocols, message formats and other integration artifacts across large numbers of applications and systems, trading partners, internal SOA services and cloud APIs, and multiple projects. Key community management functionality includes collaboration via Web applications and social-networking-style tools, campaign/program life cycle management, and role-based task delegation and tracking.
- Architectural consistency (weight: medium): Initiatives, patterns, features, capabilities and standards to support integration and architectural coherence of the vendor application infrastructure offering (e.g., common [across the individual products] development tools, common metadata

repository, common runtime containers, common flow managers, common monitoring and management tools, common security and other common components; support for “pluggability” standards such as OSGi, Java Business Integration [JBI] or SCA).

- Openness and interoperability (weight: medium): Features and capabilities to support interapplication and intra-application communication and federation among disparate SOA environments (i.e., communication middleware and standard protocols). Initiatives, patterns, features, capabilities and standards to support interoperability and integration with other vendors’ platforms, as well as to enable users to incorporate third-party products and technologies in your application infrastructure offering.
- Monitoring, management and administration (weight: medium): Features and capabilities to support operations (administration, security, governance, version management, disaster recovery, etc.) of projects based on the vendor’s application infrastructure.

Table 2 shows the weighting used for each criterion.

In addition to the evaluation of released or imminent product features, the product road map was also taken into account in all Completeness of Vision ratings. Such road maps are subject to change, but they still reflect the current vision of the vendor’s business and engineering leadership.

Leaders

Leaders are vendors with a proven and comprehensive integrated product set, as well as a sizable installed base of reasonably satisfied clients that extends internationally. Leaders have an ample installed base of products to cross-sell their integration solutions to, and have demonstrated their ability to anticipate technology and market trends over the years by extending their offerings to support the data consistency, multistep process and composite application integration styles that occur in systematic A2A and B2B integration projects.

Leaders manifest their understanding of the problem space by providing innovative features, and by extending their integration technology in a manner that supports near-neighbor initiatives like SOA and BPM.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	low
Sales Strategy	low
Offering (Product) Strategy	high
Business Model	low
Vertical/Industry Strategy	standard
Innovation	high
Geographic Strategy	standard
Source: Gartner (October 2010)	

Challengers

Challengers are vendors that have demonstrated that their technology can support the implementation of numerous large, business integration projects, and have built platforms capable of effectively competing against, and often besting, those of the leaders. However, these vendors are followers, rather than leaders, in providing new, innovative features, or their innovation is focused on a specific problem space. In some cases, their vision is not manifested through focused marketing messages and value propositions. In other cases, their vision is not manifested through comprehensive geographic coverage. Challengers have the opportunity to become leaders through greater product innovation, combined with a marketing and sales focus on all aspects (A2A, B2B and integration of cloud-based applications) of application integration.

Visionaries

Visionaries demonstrate innovation from a product and technology innovation perspective. They have significant investments in integration technology, and their prospects for survival and growth depend on their ability to establish a strong presence in application infrastructure for application integration. However, the products of some larger visionaries have relatively small installed bases, and, in some cases, their production readiness is not fully proved via a spectrum of mission-critical deployments.

Through diligent and focused execution, it is possible for some Visionaries to have the opportunity to become Leaders, but the likelihood is small. Limited sales, marketing, engineering and support resources create enormous obstacles for such ambitions. Many of these vendors are likely

to merge or be acquired by larger companies, but some offer excellent and highly innovative products that outperform large vendors' offerings.

Often, products in the Visionaries quadrant can be used together with point products from other vendors to create a comprehensive middleware infrastructure that has all the features offered by the "one-stop shopping" suites of larger vendors in the Leaders quadrant.

Niche Players

A Niche Player often offers good and, in some cases, excellent integration technology. However, the focus of that Niche Player on a specific vertical market has resulted in products that are less useful in integration problems outside that domain. Alternatively, a vendor may lack focus on this problem space, which, for it, is a marginal business. Other reasons for vendors to be positioned in this quadrant are that they have limited sales, marketing and support resources, or are committed to only one geography or installed base.

Nevertheless, application integration technology from a niche vendor can be an optimal choice for specific classes of users (for example, users in a particular vertical market where the vendor's integration technology is focused, or users in the same geography where the vendor is focused). Additionally, Leaders' and Challengers' products are often too complex and expensive for small or midsize businesses (SMBs), or users whose requirements are not overly demanding. Users with less-stringent requirements may find more-suitable products from Niche Players and Visionaries.

A vendor in this quadrant could emerge as a visionary through a greater commitment to innovation and focus on this market.

The vendor comments, strengths and cautions below contain an entry for each vendor. The comments portion of the entry contains a representative list of products for the vendor. Please keep in mind that packaging varies from vendor to vendor. Thus, a large number of products from one vendor may be contained within a single product from another vendor.

Vendor Strengths and Cautions

Axway

Axway is a longstanding vendor in this space, with its Synchrony platform, and line of products and solutions that address application integration within the firewall, and multienterprise B2B and MFT with a company's business partners, the latter being Axway's primary focus. Axway's breadth of technology has been built through several successful acquisitions. Primary products for systematic application integration projects are Axway Integrator (the main broker, now at version 3.5), Axway ProcessManager (BPM, version 2.2), Axway Composer (composition and modeling, version 5.3) and B2B solutions for the financial services, automotive, healthcare and supply chain industries.

Strengths

- Leading B2B and MFT software platform (also available as integration as a service).
- Mature technology for core integration projects, a good range of offerings that covers BPM and BAM, and a well-established customer base worldwide (over 11,000 organizations in more than 100 countries).
- Proven history of execution, growth and intelligent use of effective acquisition.

Cautions

- Now threatened by competing megavendors and their increased interest in B2B.
- Must continue to resolve the duplication in functionality coming from the recent Axway acquisitions (the last one being of Tumbleweed Communications), and must continue to minimize customer impact for migration off products that have reached the end of the line (e.g., AMTriX).
- Limited Axway brand awareness, especially outside Axway's historical territories (France and the U.S.).

Cordys

Cordys Business Operations Platform version 4 (BOP-4) is a process-enabled composition platform featuring business process execution, state machine, and user interface application server containers and the SOA grid (ESB). Consequently, it supports A2A and B2B integration projects through tooling designed to create and support the operation of compositions.

Strengths

- Combines a strong focus on process management with rich Internet application (RIA) support and SOA as a strategic product direction.
- BOP-4 offers a comprehensive composition toolset, including support for asynchronous JavaScript and XML (Ajax) mashups and non-SOA integration via Java EE Connector Architecture (JCA) in their adapters. The adapters are offered as open-source technology to the Cordys community.
- Highly available and scalable using advanced, event-driven internal architecture. The architecture and multitenant capabilities of the BOP-4 enable it to be deployed in public and private clouds.
- Central repository for managing and publishing integration artifacts.

Cautions

- Small (175 customers) but growing installed base due in part to product positioning. Many organizations don't recognize what a composition platform does, and why they need one.
- Limited market awareness and brand recognition primarily due to sales, which are small but sized appropriately for a small vendor.
- Packaged application adapters are provided via partnerships.
- Multienterprise integration focused on supporting the integration of cloud-based applications. Cordys lacks high- and low-level community management features required to support business transactions with a large number of trading partners.

E2E Technologies

The evaluation of E2E Technologies' position in this Magic Quadrant is based on the functionality provided by the E2E Bridge Release 5.0 (released in April 2010) product that provides a full set of integrated capabilities, including those required for supporting systematic application integration requirements.

Strengths

- E2E Bridge is an innovative platform that combines ESB and orchestration capabilities on top of a high-performance, highly scalable, proprietary application server platform.
- The product provides rich application integration capabilities (mapping, orchestration and adapters), and is based on a highly productive and completely model-driven Business Process Modeling Language (BPML) and Unified Modeling Language (UML) development and execution environment (based on a proprietary "UML virtual machine") that does not require any form of coding.
- The product has been proved in approximately 200 real-life deployments (in about 70 clients), in many cases supporting demanding application integration projects, especially in SAP-centric user environments.

Cautions

- E2E Technologies is a relatively small company headquartered in Switzerland, with limited R&D and marketing investment capabilities, and heavily relying on partners for sales operations outside Central Europe.
- The E2E Bridge product has a low E2E brand awareness outside its home geography.
- The product B2B integration capabilities lack support for external partner community management.

Extol International

Extol targets its 100% Java-based flagship integration middleware, Extol Business Integrator (EBI), primarily at companies with limited IT skills for B2B projects, which are typically driven by e-commerce mandates issued by external business

partners, such as retailers and manufacturers. In its external communications, Extol positions its solution as “outside-in” integration middleware, a well-suited metaphor to communicate that it’s designed to perform internal integration to support e-commerce mandates.

Strengths

- Portable (100% Java-based), well-integrated, rightsized solution that is available in multiple environments (including those found in SMBs).
- SMB-friendly – for example, with installation “wizards” and a relatively small product footprint.
- Supports internal, within-the-firewall and B2B integration with the emphasis on B2B.
- Flexible pricing and packaging – typically less expensive than best-of-breed (BOB) solutions and available, for example, via appliances.

Cautions

- Less proven in large-scale B2B projects and A2A-centric projects.
- Limited mind share and market share.
- Limited international footprint.

Fiorano

Founded in 1995, Fiorano was one of the first vendors to offer an ESB product. Its application integration products include Fiorano ESB, FioranoMQ and Fiorano adapters.

Strengths

- One of the earliest ESB vendors, Fiorano offers a unique and highly productive development process and runtime paradigm.
- Proven, scalable and reliable MOM backbone.
- Compatible with diverse OSs and application servers.
- Able to address a broad range of use cases, including application and system integration scenarios, simple to high-end, sophisticated SOA (including EDA) and the integration of on-premises with cloud-based applications.

Cautions

- Fiorano has low market visibility, and its marketing sometimes shifts usage scenarios, which has the potential to confuse potential customers seeking application integration technology.
- Small vendor, with limited sales and support staff for SOA and the application integration market.
- Supplies only the SOA and integration backplane; must partner to deliver B2B community management, BAM, portal and BPM workflow capabilities.
- Must stretch development resources to stay current with evolving industry standards.

Fujitsu

Fujitsu’s position in this Magic Quadrant is based on the functionality provided by its Interstage family of products, which includes Interstage Service Integrator version 9.2, Interstage Job Workload Server version 9.2, Interstage Information Integrator version 10.1, Interstage Data Quality version 10.0, Interstage Data Effector version 9.1, Interstage Information Storage version 10.0 supporting core ESB requirements and message/Data/adaptor capabilities, Interstage Business Process Manager version 11.0, Interstage Business Process Management Analytics version 11.0 and Interstage Studio version 9.2 for orchestration and advanced ESB capabilities.

Strengths

- Fujitsu Interstage Service Integrator has a track record in designing and implementing ESB capability to achieve customer operational cost reductions and transformation (legacy modernization initiative – from batch-centric to real-time enterprise) with high performance and high reliability.
- Fujitsu’s offerings cover all styles of application integration (i.e., composite application, multistep process and data consistency) by offering a broad set of products, including Symfoware (Fujitsu’s information management product brand) and Systemwalker (Fujitsu’s system management product brand), in addition to the Interstage family.

- Fujitsu's application life cycle management strategic initiative is differentiating through the integration of the application/service development/deployment capabilities provided by Interstage and the management features offered by the Systemwalker family via CentraSite metadata management technology. This offering has the goal of providing users with an integrated and comprehensive environment for development, deployment and management of SOA-style applications.

Cautions

- The comprehensiveness and advanced features of Fujitsu's adapter offerings depend on its partners.
- Fujitsu's B2B capability and its B2B presence outside Japan are very limited.
- Fujitsu's Interstage installed-base growth rate is slow and still relatively small outside Japan.

GXS

By virtue of its recent Inovis acquisition, GXS now has two flagship integration middleware offerings: Enterprise Gateway and BizManager. Enterprise Gateway is GXS's original product, which is a hybrid combination of webMethods Fabric (for SOA infrastructures and BPM) with webMethods Optimize (for BAM) and GXS's legacy Application Integration (for high-performance EDI translation). BizManager was Inovis' innovative flagship middleware product, which has evolved through several generations of enhancements, and via additions from new developments.

Strengths

- Product quality and reliability (for both Enterprise Gateway and BizManager) for large B2B projects.
- Product Innovation, e.g., webMethods Optimize (from Software AG) for Enterprise Gateway and BetweenMarkets (compliance engine) for BizManager.
- Hybrid deployment of B2B projects that combine the use of Enterprise Gateway and Trading Grid, or BizManager and Inovisworks.net.
- Large, international presence supported by viable alliances, e.g., Microsoft and Software AG.

Cautions

- Reconciliation of overlapping Enterprise Gateway and BizManager product functionality and road map.
- Primary company focus is on B2B services (not on integration middleware).
- Declining integration middleware market share and mind share.
- Sustained organic revenue growth (rather than by acquisition).

Hitachi

Hitachi's position in this Magic Quadrant is based on the functionality provided by its family of products, which includes uCosminexus Service Platform V8 and uCosminexus Service Platform Workcoordinator V8, Enterprise File Transfer, Batch Job Execution Server, Message Service for ebXML, Interschema, and NGN Application Adapter.

Strengths

- Service Platform is based on reliable, high-performance, large-message (several gigabytes) message technology and supports three types of integration (composite application, multistep process and data consistency) across private and public clouds. It also enables EDA applications by asynchronous message style and batch processing by WS-BPEL-2.0-ready BPM capability.
- Service Adapters for connecting to mainframe environments by message queue, flat file and object access. The adapter suite includes iWay adapters for connecting to packaged applications and the NGN Application Adapter to enable applications to access next-generation network (NGN) services, hiding complex telecommunication protocols.
- Interschema offers visual (no programming) mapping for various data formats required in an EDI context and supports various industry-specific data format standards. ebXML Message Service offers a reliable and robust message infrastructure for B2B scenarios, especially in retail and manufacturing industry segments (mainly in Japan).

Cautions

- Support for advanced B2B integration features (e.g., dashboards) requires enhancement.
- Hitachi uCosminexus should be changed to provide a single, integrated design/modeling environment across uCosminexus products.
- uCosminexus presence is limited outside Japan.

iWay Software

iWay Software entered the application integration market in 2001 by providing adapters and expanded from there. Its primary application integration products include iWay Service Manager 6.0.1, Trading Partner Manager and its Universal Adapter Suite.

Strengths

- Has a flexible ESB suite suitable for supporting all integration patterns, as well as SOA.
- Deployment footprint is smaller than that of many vendors, because the use of Java Platform, Standard Edition (Java SE) circumvents the need for a full-blown Java Platform, Enterprise Edition (Java EE) application server.
- Largest adapter portfolio (more than 300) on the market. Comprehensive adapter development environment (Universal Adapter Framework) with application introspection feature.
- Cloud-based offering hosted on Amazon Elastic Compute Cloud (Amazon EC2) that, together with standard Service Manager, offers potential customers a range of purchase models, from perpetual licenses to usage-based pricing. Amazon Machine Images hosting Service Manager licenses are sold through Amazon, resulting in customers receiving a single invoice for both Amazon and iWay products.

Cautions

- Although iWay Service Manager is less-expensive than some competing products, it suffers from the lack of brand awareness.
- The cost of its adapters provides challenges in building a business case for ROI for the entire iWay portfolio, and the experience of users and system integrators with iWay adapters is uneven.

- Although iWay offers an integrated SOA governance solution based on AmberPoint, users of other SOA management technologies will be required to integrate, at the metadata level, other SOA management products with iWay Service Manager.
- iWay has grown its customer base to more than 500, but current market dynamics, that is, the shift to conservative buying patterns that occurs in a market whose products are maturing and where there is growing megavendor market share, will provide significant challenges to smaller vendors.

IBM

The portfolio of application integration products considered to assess IBM's position in this Magic Quadrant includes a variety of products belonging to the WebSphere 7 family. Among them, the most relevant are WebSphere Message Broker, WebSphere Process Server (WPS), WebSphere Enterprise Service Bus, WebSphere Transformation Extender, WebSphere Partner Gateway, WebSphere Registry and Repository and the WebSphere DataPower Integration Appliance XI50 and Integration Blade XI50B and WebSphere DataPower B2B Appliance XB60. As a result of its acquisition of Sterling Commerce, which just closed, IBM also now has the Sterling Integrator (SI) middleware as part of its WebSphere portfolio.

Strengths

- IBM brand recognition, global reach, market share in key application infrastructure middleware segments (e.g., in 2009, IBM garnered 21% of the \$2.0 billion ESB suite market) and mind share, and a huge installed base of hardware and software products that are leveraged for WebSphere sales, including those supporting strategic application integration projects
- Comprehensive product line, including market-leading products (e.g., WebSphere MQ, WebSphere Message Broker and WebSphere DataPower) and with large installed base and deployment successes for integration and SOA. The product line addresses needs for application integration, SOA infrastructure, CEP and BAM projects, and is complemented by the Infosphere product line for data integration.

- Resounding Smarter Planet marketing initiative that advertises process-based solutions that attracts business, and that drives the use of WebSphere infrastructure products.
- Product offering is sustained through massive partner programs and is complemented by professional service offerings that include comprehensive methodologies for application integration and SOA projects across IBM Global Business Services and IBM Software Group.

Cautions

- Some users experience problems in getting WPS and associated products (e.g., WebSphere Integration Developer) to meet their requirements – even with IBM resources involved.
- For implementing mission-critical interfaces in a homogeneous WebSphere environment, be prepared for IBM to suggest a large number of products. For example, WebSphere Business Modeler (WM), WebSphere Integration Developer (WID), WPS, WebSphere Enterprise Service Bus (WESB), WebSphere Business Monitor and WebSphere Registry/Repository are often proposed together. This makes the IBM offering suitable primarily for the most complex requirements, and often creates the requirement for a significant amount of professional services and support to deploy the products and get initial integration interfaces up and running.
- Multiple acquisitions including Lombardi, Cast Iron Systems and Sterling Commerce will require significant product rationalization and integration efforts, and poses positioning challenges for IBM and potential product discontinuity issues for users.
- IBM's motto is fit-for-purpose functionality. But the fine-grained differences and functional overlaps (for example, between, WebSphere Message Broker, WPS and ESB, and the DataPower XI50 appliance) make it difficult for potential users to determine which products best meet their requirements.

InterSystems

InterSystems is a leader in integration technology for the healthcare vertical industry. Its application integration features are provided by Ensemble, along with its prebuilt adapters and its adapter development framework.

Strengths

- InterSystems has a leading presence and name recognition in healthcare markets as an integration technology provider, and strong support of healthcare industry integration standards and protocols, including recent entry into the internationally emerging electronic health records management space.
- Well-designed, well-integrated, high-performance technology suite with a highly productive programming model. This has resulted in a successful track record in multiple patterns of application integration projects.
- Growing adoption in new vertical markets (including financial, telecommunications and government), beyond traditional healthcare.
- Strong, profitable, private business with no debt; worldwide presence with a large number of partners.

Cautions

- Still largely unknown as an application integration platform provider outside the healthcare market. Minimal presence or influence in industry trends, consortia or standards initiatives outside of healthcare.
- Minimal support for specialized B2B integration scenarios force customers to alternative vendors and the consequent additional cost of system integration.
- Behind in leading-edge IT trends, such as cloud computing, social computing and context-aware mobile computing, with no public road map in most of these areas.
- Privately held business, and can be prone to surprises more than transparent, publicly owned businesses, although the company has had a steady business record.

Magic Software Enterprises

Magic Software Enterprises is a vendor of development and middleware platform technology. The iBOLT 3.2 product was reviewed for this Magic Quadrant and includes ESB capabilities, as well as some specialized frameworks for particular integration solutions.

Strengths

- Rich and easy-to-use iBOLT integration platform based on a proven, metadata-driven and SaaS-enabled application development and runtime container that provides transformation, routing, human workflow, modeling, composition, portals and BAM.
- Specific iBOLT packaging addresses SAP Business One, JDE Connect, salesforce.com, SharePoint, Microsoft Dynamics, HL7 and iSeries integration scenarios.
- Global network of partners (independent software vendors [ISVs], value-added resellers [VARs] and system integrators) provide much larger distribution and support than company size would suggest.
- Singular focus on SMBs, as well as SAP, Oracle's JD Edwards World and salesforce.com's and IBM's System i ecosystems via indirect channels.

Cautions

- Additional marketing initiatives have not substantially increased brand awareness, combined with a stable but relatively small organization, means challenges for worldwide growth.
- Focus on SMBs limits the appeal for large enterprises, which are the biggest consumers of back-end integration technology.
- While the architecture is open, the focus on specific scenarios limits the appeal to heterogeneous organizations looking for general-purpose technology.

Microsoft

On its seventh release, BizTalk Server is Microsoft's primary integration technology. In 2009, Microsoft garnered 13 % of the ESB suite market software revenue. Its 2010 release (due before YE10) will be tightly integrated with Visual Studio, Team Foundation Server and its AppFabric offering.

Strengths

- Brand recognition, global reach, mind share and a huge installed base of products that is leveraged for BizTalk Server sales, and results in the availability of skills, services and add-ins that fit within the environment.

- BizTalk Server installed base of more than 10,000 customers – two-thirds are estimated to be BizTalk Server 2006 Enterprise Edition or newer versions, establishing a broad base of mature and stable products with proven track records.
- Microsoft will offer AppFabric Connect to integrate BizTalk Server 2010 with Windows Server AppFabric, making it easier to leverage Windows Workflow Foundation and Windows Communication Foundation.
- While Microsoft plans slight price increases for all BizTalk Server 2010 editions, its per-processor pricing, combined with the ability to run virtual instances at no additional charge, makes it the least-expensive perpetual license of commercial offerings that Gartner analyzed.

Cautions

- Microsoft offers extremely broad support for Web Services standards (WS*). However, the usefulness of that support is dampened by the lack of widespread demonstration of interoperability of advanced Web Services standards (e.g., Web Services Addressing [WS-Addressing] and Web Services Eventing [WS-Eventing]) with Web services stacks from other vendors.
- Integration – in particular, the integration required to support services for mission-critical services and applications – is best approached systematically. While Visual Studio 2010 offers UML modeling and Team Foundation Server integrates with BTS 2010, Microsoft's tooling still encourages opportunistic development. This does not imply that Microsoft tooling cannot be used systematically; rather, it is a caution not to use Microsoft's tooling opportunistically for mission-critical interfaces.
- For a registry, Microsoft offers a bare-bones Universal Description, Discovery and Integration (UDDI) 3.0 implementation. Team Foundation Server offers some life cycle management features for Visual Studio artifacts. System Center offers operational policy management in a Windows environment. However, to obtain one set of technologies that supports design time and operational governance across assets deployed in a distributed heterogeneous environment, most users rely on technologies from Microsoft partners like HP and SOA Software.

- Most vendors are extending their SOA messages and technologies to support BPM. Although it has invested in improvements to Workflow Foundation in .NET 4, Microsoft continues to leave key BPM tooling to its business process alliance partners.

MuleSoft

MuleSoft is a venture-capital-funded company that provides support and maintenance for technologies developed by the Mule open-source community. The open-source software (OSS) community has 25 MuleSoft developers focused on the Mule ESB, and an external community of 80 developers. First released in April 2005, the current release of Mule ESB (version 2.2.6) became generally available in August 2010. The primary products offered by MuleSoft for application integration are Mule ESB, Mule MQ version 5.1 and Mule Data Integrator version 3.0.7 (data transformation technology).

Strengths

- Paying only for support and maintenance removes software licensing (a capital expense) from procuring ESB technology, making it attractive to organizations that are tightening their capital outlay.
- The company has over 2 million downloads, 2,000 estimated production deployments and 120 supported customers, with a growing number of references using the Mule ESB in mission-critical deployments.
- The RESTx platform for producing, consuming and orchestrating representational state transfer (RESTful) services. It supports multiple languages (currently, Java and Python), and contains a reverse proxy server to support the composite service use of cloud-based RESTful services.
- While not OSGi-compliant, Mule ESB enables hot deployment of services or groups to the Mule container enabling changes on the fly.

Cautions

- The market for application integration technology continues to consolidate. Offerings from leading vendors have features that are expensive, opening the door (based on an increasing number of client inquiries) for OSS support and maintenance providers. The jury is still out as to whether a vendor that relies on subscription revenue can carve out a space in this consolidating market.

- The application infrastructure market is dominated by megavendors and a few application infrastructure specialists. While there's evidence that a vendor can carve out a niche using a business model that relies solely on support, maintenance and consulting, doing this will be an uphill battle. Young vendors (less than 10 years old) using this business model must be considered less viable than vendors offering conventionally licensed software.
- While MuleSoft boasts a very large number of technical adapters, it lists very few for widely deployed commercial packaged applications like SAP Business Suite or Oracle E-Business Suite.
- Relies on partners to leverage and extend Mule ESB and Data Integrator to support B2B integration, creating the problem that the integrated set of technology (MuleSoft and partner offering) has not yet experienced the "production testing" of a large installed base.

NEC

NEC's position in this Magic Quadrant is based on the functionality provided by its WebOTX family of products, which includes WebOTX Enterprise Service Bus version 8.3, WebOTX Process Conductor version 7.1 and WebOTX Developer version 8.3, WebOTX OLF/TP Adapter version 7.1, WebOTX Gateway Builder version 7.1, BizEngine version 3.1 and TransBroker version 2.2.

Strengths

- NEC is a megavendor that offers a broad range of products (from hardware to vertical-industry-specific applications, as well as system integration service), and has a big presence in many industry segments, especially telecom, the manufacturing industry and the public sector.
- NEC's WebOTX ESB is a mission-critical, proven, high-performance and robust product, and includes a multidomain management feature to simplify managing operations in distributed environments, including cloud.
- BizEngine and TransBroker graphical mapping features provide support for various data formats and protocols, including vertical standard protocols for B2B integration (e.g., the Japan Chain Store Association).

- NEC offers adapters for connecting major packaged applications (e.g., SAP and Oracle), as well as adapter partners like iWay Software and Micro Focus that provide connectivity to Customer Information Control System (CICS) and Information Management System (IMS).

Cautions

- NEC's vision and technology for BPM-oriented cloud offerings with integration across clouds must be proved inside and outside Japan.
- The number of partners that supports WebOTX ESB needs to be expanded.
- WebOTX brand recognition and its installed base are limited outside Japan.

Oracle

The evaluation of Oracle's position in this Magic Quadrant is based on the functionality provided by the Oracle Fusion Middleware (OFM) 11gR1 family of products (released between July 2009 and June 2010), and specifically by Oracle SOA Suite, which includes Oracle Service Bus (ESB technology), Oracle BPEL Process Manager (orchestration), Oracle Business Rules, Oracle B2B and other components.

Strengths

- OFM is a large and fast-growing business that positions Oracle as the second-largest application infrastructure middleware vendor in the market. The technology is supported by a vast network of partners, and thousands of organizations in virtually every geography and in multiple vertical industries have successfully deployed the current or previous versions of OFM, in a large number of cases to support large and business-critical application integration scenarios.
- OFM provides a comprehensive, integrated (e.g., Oracle JDeveloper common development toolset, Oracle Enterprise Manager common management environment, common Metadata Service and common Service Infrastructure), and feature-rich application infrastructure offerings, also providing leading technologies to support application integration requirements.

- The OFM road map addresses key integration technologies (e.g., more-powerful mapping and transformation and new unified adapter architecture) and emerging requirements (e.g., support for integration of mobile applications).
- Synergies with large Oracle DBMSs and packaged application businesses could potentially create plenty of opportunities for cross-selling OFM technologies to support application integration projects.

Cautions

- The relentless pace of Oracle's acquisitions in the packaged applications and application integration middleware markets (e.g., BEA Systems, Sun Microsystems and AmberPoint) requires further technology integration work, and poses migration and upgrade challenges for preacquisition product users.
- Despite significant adoption, the OFM 11gR1 product set requires more proof points about its use in complex and large-scale, real-life deployments.
- Oracle's campaign management features are weak. While Oracle's B2B technology provides APIs to enable trading partner provisioning, it doesn't yet include a graphical user interface that allows trading partners to self-provision their own trading partner profiles. The B2B service also lacks an application that supports the specifications and management of the trading partner onboarding process as a graphical workflow defining tasks, roles and responsibilities. Oracle doesn't offer integration as a service, although it has partnerships in place for this market.
- Although Oracle and partners provide consulting services and migration aids, the migration path from prior-generation application integration technologies coming from acquisitions (e.g., BEA Systems' WebLogic Integration, Sun's eGate and Java Composite Application Platform Suite [JCAPS]) to the strategic Oracle SOA Suite 11gR1 is still onerous for some clients (for example, those with Monk code).

Pervasive Software

While Pervasive's primary focus is data integration, we have rated it in this research because its product is also suitable for a wide range of integration project styles, including data, process and SOA integration. Its reasonably priced, portable and Java-based flagship integration product, Pervasive Data Integrator (PDI), is often licensed and embedded in other IT solutions by ISVs and VARs, and its more-recent and innovative integration-as-a-service offering, Pervasive DataCloud, has attracted many users of SaaS functionality, particularly of salesforce.com.

Strengths

- Embeddable, small-footprint solution suitable for different integration project styles.
- Large portfolio of in-house-developed integration adapters.
- Large customer base, particularly through its indirect sales channel (hundreds of partners).
- Flexible delivery model, including stand-alone and embedded software, and integration as a service.

Cautions

- Lacking high-end integration infrastructure support, e.g., ESB, SOA governance and community management.
- While the product is scalable (e.g., is multitenant and supports clustering), it is usually deployed tactically, rather than enterprisewide.
- Limited presence and market share.

Progress Software

Progress Software is a middleware and solution vendor. It has a portfolio of products that makes up the capabilities used to develop application integration, including Sonic ESB 8.0, SonicMQ 8.0, Actional Enterprise 8.1, Apama event processing platform, DataDirect Shadow Z/services and Z/events, and FUSE ESB.

Strengths

- Responsive Process Management is a high-level, integrative message that fits well with the goals of leading enterprises.

- The products are able to address a broad range of projects, from simple SOA to high-end, process-centric integration scenarios, and has added the open-source option.
- Proven, scalable and highly available messaging backbone (SonicMQ) and ESB (SonicESB), as well as a unique mainframe integration technology (DataDirect Shadow real-time enterprise).
- Highly functional service management offering (particularly Actional 7); leading-edge, high-volume, low-latency event processing capability (Apama); and leading BPM technology (Savvion).

Cautions

- Competition from larger vendors with an established presence in major accounts has impeded the growth of smaller, pure-play vendors like Progress.
- Operational-responsiveness message is very broad, and involves many decision makers, which lengthens sales cycles.
- Limited support resources for large customers.
- The global footprint is improving, but different geographies have different resource availability.

Red Hat JBoss

The primary Red Hat JBoss application infrastructure offering for application integration is the JBoss Enterprise SOA Platform (integration and composition platform, including JBoss ESB, jUDDI, JBoss Rules, jBPM and other open-source components) and the JBoss Operations Network (comprehensive management tool). The component parts, including JBoss ESB, are also available for download as separate open-source offerings on JBoss.org for free, but without support and any level of certification.

Strengths

- The combination of a leading, open-source OS Red Hat Enterprise Linux (RHEL) and a dominating open-source application server technology (JBoss) positions the company as a leader in the open-source application platform market. All JBoss customers also have application integration requirements and are a natural market for JBoss integration technology.

- The pure, open-source offering is differentiated from most application integration competitors, and offers an avenue of expansion through the adoption of other open-source projects.
- The synergies between the Red Hat core OS business and JBoss application infrastructure business offers promising opportunities – especially in cloud-computing contexts.
- Technical expertise of JBoss engineering supports development of advanced middleware capabilities like distributed transaction processing, event processing and business intelligence.

Cautions

- Exclusive bundling of JBoss ESB into the JBoss Enterprise SOA Platform offering reduces its visibility, and prevents JBoss ESB adoption by less-comprehensive projects.
- JBoss ESB is recent technology, with a limited installed base, and must still be proved in high-demand deployments; delegating some important functionality to third-party partners (e.g., iWay adapters) also reduces the completeness of the offering.
- Minimal support for B2B requirements reduces the ability of JBoss to compete for some strategic application integration projects.
- No plans for an application integration as a service or a cloud-enabled integration platform offering limits the breadth of the company vision in this market.

SAP

The products considered to assess SAP's position in this Magic Quadrant belong to the SAP NetWeaver 7.1 family, and include SAP NetWeaver Process Integration (SAP PI), which supports ESB, orchestration and SOA governance; SAP Solution Manager, providing management and administration capabilities; and SAP NetWeaver Composition Environment, SAP NetWeaver BPM and SAP NetWeaver Business Rules Management for orchestration, as well as for other BPM suite (BPMS) features.

Strengths

- The large and loyal installed base of SAP's packaged business applications provides plenty of opportunities for SAP to cross-sell NetWeaver components to SAP application clients wishing to adopt an end-to-end platform to address their systematic A2A and B2B integration requirements.
- For organizations strongly committed to the SAP application strategy, NetWeaver is an obvious and compelling (commercially and from a skills perspective) technology option for their application integration projects, because of its affinity for and preintegration with SAP packaged applications.
- The NetWeaver SAP PI product has a large and rapidly growing installed base for SAP-centric A2A and B2B integration projects, and its road map targets relevant standards (e.g., OSGi and SCA).
- The announced community-based, cloud-enabled mapping and transformation capability is a visionary approach to enable collaboration and sharing of mapping artifacts within an organization and among different organizations.

Cautions

- The currently disclosed road map for NetWeaver doesn't support SAP's ambitious technology vision encompassing "in-memory" computing, cloud and mobile computing. Therefore, potentially disruptive evolutions of SAP's application infrastructure technology is likely to take place during the next three to five years, exposing NetWeaver users to risks of discontinuities and migrations of their NetWeaver-based application integration infrastructures.
- SAP's strategy is to focus NetWeaver as a technology of primary interest for its packaged applications installed base; therefore, it is of little interest to users looking for an application integration platform and that have no SAP application in place, and for those with a heterogamous set of packaged applications and technology platforms.

- SAP's B2B integration strategy is based on partnerships with midsize specialist vendors (Seeburger for B2B gateway software and Crossgate for integration as a service) with limited support capabilities and geographic coverage. This strategy exposes SAP and its clients to potential risks of product/technology discontinuities in the event of an acquisition of the B2B partners by SAP competitors. Moreover, SAP's cloud/SaaS integration strategy is still undefined.
- The announced road map for NetWeaver SAP PI that targets the availability of a completely Java-based Eclipse, SCA-compliant and OSGi-enabled version that is fully integrated with SAP Solution Manager in the course of 2012 may prove optimistic, given the slow pace of evolution the product has shown so far throughout its life cycle.

Seeburger

Seeburger, one of the major European integration vendors, has established itself as a strong international player, mainly based on the excellence of its technology (whose intellectual property [IP] is completely owned by Seeburger). Its Business Integration Server (BIS) is a fully interoperable service bus that is well-suited to integrating applications and BPM technology. It contains a high-performance, any-to-any transformation engine that's especially well-suited for EDI.

Strengths

- Seeburger has traditionally been and still is a leader for multienterprise B2B projects, thanks to its technology, which is entirely internally developed and well-integrated.
- Seeburger's customer base continues to expand in several geographies, and its financials still look extremely healthy.
- Its cloud strategy, which addresses both B2B and A2A, is being well-executed and is well on its way, valid for both B2B and A2A.

Cautions

- Seeburger's focus on internally developed technology excellence limits its capability to grow through technology acquisition; however, it paves the way for acquisitions in the managed-services arena.
- A further expansion of a B2B managed-services offering started two years ago, and had a rocky beginning. This offering has been revamped recently, and is gaining momentum.
- Seeburger's future as an independent company has always been the subject of unconfirmed speculations; it must be noted, however, that good technologies typically survive acquisitions, because acquiring leading functionality in an expanding market remains one of the most common reasons for takeovers.
- The Seeburger offering includes more than basic A2A, but the focus is really on B2B, which does not make it competitive for A2A-only projects.

Software AG

The evaluation of Software AG's position in this Magic Quadrant is based on the functionalities provided by the webMethods 8 family of products (released in December 2009), which includes webMethods Integration Server, supporting ESB and orchestration requirements; webMethods Broker, for messaging; webMethods BPMS, providing additional orchestration capabilities (along with other BPMS features); Software AG Trading Networks, enabling B2B integration; and CentraSite, supporting metadata management needs.

Strengths

- WebMethods is for Software AG a large and growing application infrastructure business with a large installed base of over 3,000 clients leveraging the technology in the context of multiple usage scenarios, including numerous large-scale and business-critical application integration deployments.
- WebMethods provides a comprehensive and proven application infrastructure offering, also providing leading and well-integrated technologies (e.g., common runtime container, unified design and development tool through webMethods Designer and unified metadata management through CentraSite) for A2A (including legacy mainframe) and B2B integration deployments.

- The webMethods road map addresses key integration standards (e.g., REST, BPMN, SCA, OSGi and SOA Repository Artifact Model & Protocol [S-RAMP]), technologies (e.g., canonical messages, healthcare standards, self-service external partner community management, master data management integration and CEP) and emerging requirements (e.g., cloud/SaaS integration and mobile integration).
- Synergies with the ARIS product and business consulting arms of IDS Scheer (a company acquired in July 2009) may open opportunities in vertical sectors where webMethods has historically had a limited presence.

Cautions

- The legal complexity of the integration of IDS Scheer into Software AG's R&D, marketing, sales, support and professional services organizations, and the resulting focus on BPM markets, may distract Software AG management's attention from the application integration market.
- The company's conservative, fast-follower attitude toward the adoption of emerging standards, technologies and requirements may alienate support from leading-edge user organizations looking for advanced application infrastructure technologies.
- The webMethods 8 product set requires further proof points of its "production readiness" in terms of production deployments. Its installed base and examples of completed migration projects from previous versions are still relatively small.
- Although Software AG is developing such a capability, webMethods 8 doesn't yet provide a unified deployment, administration and management environment across the product set. This makes IT operations challenging when users need to deploy more than one product to support their SOA backplane and governance requirements.

Sopera

Sopera provides subscription-based support and maintenance for an integrated set of technologies from multiple open-source providers, including Intalio, Talend and Apache ServiceMix. The first public offering (Sopera 3.0) was released in March 2008. The current release of Sopera Advanced Service Factory (ASF), primary product offered for application integration, became generally available in May 2010.

Strengths

- Sopera ASF is a robust ESB built on Apache ServiceMix 3.3, which supports application integration and SOA deployment. ASF Community Edition is available for the Linux operating environment and OSS application servers like Tomcat and JBoss.
- ASF Enterprise Edition offers plug-ins for data integration, BPM and SOA, including governance, security and identity management, and service and system management. It is available on additional operating environments (e.g., Windows and Unix) and execution containers (e.g., WebSphere Application Server and .NET).
- ASF has a modern, OSGi-compliant architecture that supports the hot deployment of bundles to the ServiceMix container, enabling changes on the fly.
- A business model built on support and maintenance subscriptions removes the challenge of obtaining capital budget, which is part of sale cycles for commercially licensed software products, making it attractive to organizations that are tightening their capital outlay.

Cautions

- Sopera is a young company founded in 2007 and based in Bonn, Germany. It is methodically expanding outside EMEA into the U.S., but it has little presence in Asia/Pacific. Its products have not been proved by a product base the size of leading vendors.
- B2B support is limited to support for file formats (e.g., EDI and Electronic Data Interchange for Administration, Commerce and Transportation [EDIFACT]) and protocols (e.g., RosettaNet and SWIFT).

- The application infrastructure market is dominated by megavendors and a few application infrastructure specialists. While there's evidence that a vendor can carve out a niche using a business model that relies solely on support, maintenance and consulting, doing this will be an uphill battle. Young vendors (less than 10 years old) using this business model must be considered less viable than vendors offering conventionally licensed software.
- Sopera intends to rely primarily on open-source communities to provide adapters. While it offers adapters to Microsoft CRM and salesforce.com, it offers only a limited set of adapters for widely deployed commercial packaged applications, such as the adapter it offers for SAP Business Suite.

Sterling Commerce

Sterling Commerce maintains a leadership position and substantial market share with its flagship integration middleware product, Sterling Integrator (SI). It also maintains a large user base for its legacy Connect:Direct (C:D) MFT and Gentran Server (GS) EDI and XML translator. While SI is capable and is used at times for stand-alone internal (A2A) integration, its sweet spot and primary application is as an "edge server" for B2B projects, which includes a requirement to integrate with external business partners on the one hand, and various internal applications on the other. IBM announced the completion of the Sterling Commerce acquisition on 27 August 2010. For the potential impact on Sterling products, refer to "IBM Makes a Big B2B Play With Strategic Potential as It Acquires Sterling Commerce."

Strengths

- SI portability, quality and scalability.
- Large, global SI, C:D and GS customer base, leading to mind share (for B2B integration projects).
- Well-executed, hybrid B2B software and service strategy (more so in North America), i.e., B2B projects can be deployed across SI and Sterling Collaboration Network.
- Vendor viability via market share and a strong parent company, now IBM (previously AT&T).

Cautions

- Limited SOA infrastructure – SI lacks strong SOA governance and a user-accessible ESB, which has limited SI's adoption as a strategic infrastructure for A2A integration projects.
- Onerous migration of some GS users to SI, driving some to switch providers, rather than port GS-based projects over to SI with Advanced File Transfer.
- While SI has been proved in numerous, demanding large-scale and high-throughput B2B projects, some users have reported challenges in successfully configuring it to successfully achieve performance and reliability objectives.
- Despite some improvement over the last two years, there are still some complaints about account management.

Tibco Software

Tibco Software was founded in 1997, initially offering Tibco Rendezvous messaging technology. In 2009, Tibco garnered 10% of the \$2.0 billion ESB suite market. Its portfolio of products for application integration includes ActiveMatrix Service Bus, ActiveMatrix Business Works and Enterprise Message Service.

Strengths

- Comprehensive, well-proven application integration products with modern, OSGi-compliant architecture that are hosted in innovative ActiveMatrix container technology.
- Application integration products complemented by integrated offerings that support near-neighbor activities, including SOA (e.g., ActiveMatrix Policy Manager, ActiveMatrix Service Performance Manager and support for SCA), BPM (e.g., ActiveMatrix BPM) and CEP (e.g., BusinessEvents and Spotfire).
- All Tibco offerings are optimized to operate in heterogeneous environments.
- Although only generally available since July 2009, Silver Composite Applications Platform (Silver CAP) offers cloud-based application integration.

Cautions

- The broad set of features in ActiveMatrix BusinessWorks is not required for simple and medium-complexity interfaces.
- For simple and medium-complexity interfaces, Tibco offers the ActiveMatrix Service Bus, competitively priced for the initial, minimal set of integration technology. Users can build on the ActiveMatrix Service Bus (AMSB) product portfolio with a logical progression of technology for complex integration through the adoption for SOA, BPM and CEP, but this adds up to a hefty total investment.
- Tibco lacks a comprehensive product for testing the system built using a Tibco application infrastructure, adapters and the applications being integrated.
- Tibco's pricing and flexibility in negotiations differ widely from sale to sale, making it difficult to predict the cost of licenses at some later date.

TmaxSoft

TmaxSoft's position in this Magic Quadrant is based on the functionality provided by its application infrastructure products, which include ProBus 5 (including ProMapper for the channel tier), ProFrame 4.0, BizMaster 5 (including BizMaster EAI adapters) and AnyLink 5.

Strengths

- ProBus has demonstrated its integration capability in complex and large-scale heterogeneous application environments in the telecom industry. AnyLink supports ebXML and various other B2B protocols.
- Broad portfolio of BizMaster EAI adapters and an easy-to-use adapter design tooling and framework.
- Multistep process integration is supported by ProBus for connectivity, and it supports XML Process Definition Language (XPDL) and BPEL process specifications, as well as global transactions (X/Open DTP), and offers a simulation feature to minimize risks at execution time.

Cautions

- The TmaxSoft suite does not provide support for the formats and protocols required by vertical standards like HL7, ACORD and RosettaNet. It also lacks important features for B2B integration (e.g., monitoring and trading partner management).
- The SOA governance capability is limited, and TmaxSoft's plans for supporting SOA governance are unclear.
- BizMaster has a limited installed base outside of Korea.
- TmaxSoft is recovering from significant financial problems that plagued the company in the first part of the year, due in part to the severe economic situation in Korea and its impact on the financial industry in Korea – the primary TmaxSoft market. The recovery plan includes a sell-off of unprofitable businesses to focus efforts on the profitable application infrastructure business.

WSO2

WSO2 has more than 100 employees, and provides a streamlined open-source suite of platform technologies that is developed in conjunction with a number of open-source communities (especially Apache). WSO2 is evaluated in this market on its open-source suite of platform technologies, the WSO2 Carbon, which contains these products: Enterprise Service Bus, Governance Registry, Identity Server, Business Activity Monitor, Business Rules Server, Gadget Server, Business Process Server, Mashup Server, Data Services Server and Web Services Application Server.

Strengths

- Lightweight open-source versions of core platform capabilities, linked via OSGi, deliver a highly flexible environment with straightforward usage and capabilities.
- Promising demonstration cases in high-scale and high-volume environments.
- Highly standardized and open architecture that gives substantial freedom for organizations to combine and enhance solutions with existing integration-related technology.

Cautions

- WS02 is small company in a crowded field, with a support subscription model for open source that has been challenging to scale in other contexts. Approximately 75 current customers and most resources are dedicated to customer support and development, not field support and sales.
- The employed development community is based in Sri Lanka, which means a concentrated risk profile, but extensive involvement in communities spreads this risk somewhat.
- Limited selection of prebuilt adapters and frameworks means users must add more of their own solution content than is the case with more-mature vendors, especially those that offer prebuilt solutions. Lean model and engineering make it possible to create or add components.

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Gartner RAS Core Research Note G00205883, Jess Thompson, Benoit J. Lheureux, Paolo Malinverno, Massimo Pezzini, Daniel Sholler, Yefim V. Natis, Kimihiko Iijima, 18 October 2010

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability (Business Unit, Financial, Strategy, Organization): Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales support and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record: Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

About Microsoft

Founded in 1975, Microsoft (Nasdaq “MSFT”) is the worldwide leader in software, services, and solutions that help people and businesses realize their full potential. The Server and Tools Business at Microsoft offers products, services and solutions, including: Windows Server operating system, the Windows Azure platform, Microsoft SQL Server and SQL Azure, Microsoft Enterprise Services, Visual Studio, System Center products, Forefront security products and BizTalk Server. More information is available at www.microsoft.com.

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