Magic Quadrant for Integrated SOA Governance Technology Sets

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The recession and the need for cost optimization, combined with the market's need of service-oriented architecture in 2008 and the "cover your back" mentality, have caused many companies to rethink the importance they give to SOA governance and related technologies.

WHAT YOU NEED TO KNOW

Service-oriented architecture (SOA) governance technologies, much like any other set of technologies, are striving to address needs beyond the SOA realm. Process governance, governing cloud interactions and interactions with business partners (brokerages) are on the radar for most technology providers. Getting the basics correct is a necessity, but these technologies will likely be used to govern peripheral activities.

MAGIC QUADRANT

Figure 1. Magic Quadrant for Integrated SOA Governance Technology Sets
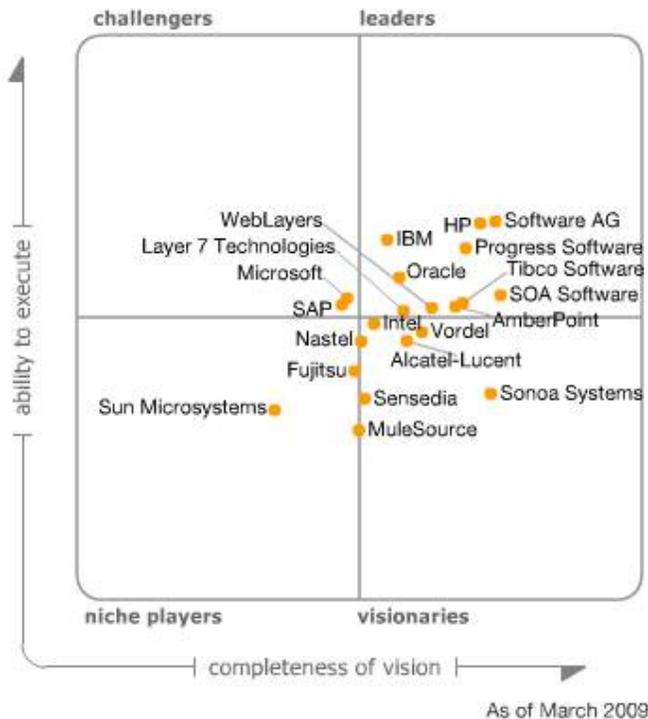
Source: Gartner (March 2009)

Market Overview

The market for SOA governance technologies is still in turmoil, with acquisitions, mergers, new players, and (most importantly) the dramatic maturation of companies procuring and deploying SOA infrastructure and SOA governance technologies. In creating the 2009 Magic Quadrant for Integrated SOA Governance Technology Sets, we immediately noticed a dramatic shift of all the participants toward the median of the quadrant (see "Understanding the Criteria, Use and Evaluation Scenarios for the 2009 SOA Governance Technologies Magic Quadrant"). When assigning vendor weightings for this Magic Quadrant, we detected, via our analysis, client interactions and vendor briefings, maturity of the market. A few key data points became very apparent:

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- Customers are no longer looking for just a registry; instead, they were looking for a suite of projects.

- A growing percentage of customers are including SOA governance technologies in their initial SOA projects.

- Customers and technology providers are putting more emphasis on SOA validation and monitoring; the latter is seen as critical to monitoring metrics and measuring success.

- Customers are deploying SOA centers of excellence, supported by the architecture group and empowered by the CIO.

- Customers are looking for solutions to easily integrate with their SOA and integration platforms.

- Customers are looking to govern their interactions with business partners and services provided via the cloud.

However, it's not just the market shifting. A few new players have entered the market that represent various niches of customer wants and needs, focused on life cycle management, monitoring and policy enforcement. Vendors that offer some or most of this functionality include:

- Alcatel-Lucent

- Intel

- MuleSource

- Nastel

- Oracle

- Sensedia

- Sonoa Systems

In addition, some vendors from the 2008 Magic Quadrant were acquired, and, as a result, the acquiring company has entered this market. Oracle, which acquired BEA Systems in 2008, is now a player in this space. An impressive number of acquisitions have taken place, with vendors in this market acquiring vendors in markets peripheral to the SOA governance technology market. Examples include:

- Oracle acquiring ClearApp

- SOA Software acquiring LogicLibrary

- Progress Software acquiring Mindreef

These acquisitions highlight the vendors' acknowledgement that monitoring, validation and life cycle management are core to SOA governance.

The job of integrating SOA governance among disparate domains remains complex, because, although obtaining SOA governance technologies from your installed middleware vendor may be less expensive than from a third-party vendor (in many cases, new technology licenses can be combined with existing ones), ensuring that the technology supports heterogeneous environments is essential. Interoperability can sometimes be difficult, and SOA governance standards and specifications are immature in some areas, such as WS-Federation (WS-FED), and nonexistent in others (governance interoperability). Ensuring that your vendor participates in

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some governance interoperability specification can help ease deployments, especially in best-of-breed situations, where appropriateness can no longer be ignored.

Market Definition/Description

As the SOA governance market matured in 2008, organizations that had been new to the market began to gain a new level of sophistication in the understanding of organizational requirements and vision for SOA deployments. Still, the market for SOA governance is a varied one, with many different types of products providing support for governing the behavior of an SOA. SOA governance is about ensuring and validating that assets and artifacts within the architecture are operating as expected and maintaining a certain level of quality. Now in its second year, this Magic Quadrant reduces the market to one set of technologies with strong architectural cohesion (integration), promoting ease of use and the interoperability of products. This integration includes the idea that multiple personas will be involved in governing an SOA (see "The Pedigree of the Integrated Service Environment Market"). Each of these personas will bring a different perspective to the process of performing different kinds of tasks. However, all these tasks must be part of a unified governance effort, instead of a different, but related, effort.

Inclusion and Exclusion Criteria

This Magic Quadrant includes vendors that explicitly sell into the SOA governance technology market. This means that only companies with products, sales, marketing and services specifically targeted at providing SOA governance were included. We currently do not include SOA and service-testing companies in the Magic Quadrant, even though SOA testing is a closely related market to SOA governance technologies. However, SOA artifact-testing capabilities enhance the ability of a governance technology set. SOA testing and validation will be a key area to watch for continued acquisitions, partnerships and mergers.

Added

Alcatel-Lucent, Intel, MuleSource, Oracle, Sensedia, Sonoa Systems

Dropped

BEA Systems, CA, Iona, LogicLibrary

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate technology providers based on the quality and efficacy of the processes, systems, methods or procedures that enable IT provider performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation. Ultimately, technology providers are judged on their ability and success in capitalizing on their vision.

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	high
Overall Viability (Business Unit, Financial, Strategy, Organization)	high
Sales Execution/Pricing	standard

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Evaluation Criteria	Weighting
Market Responsiveness and Track Record	standard
Marketing Execution	high
Customer Experience	high
Operations	standard

Source: Gartner

Completeness of Vision

Gartner evaluates technology providers based on their ability to convincingly articulate their current and future market direction, innovation, customer needs and competitive forces, as well as how well they map to the Gartner position. Ultimately, technology providers are rated on their understanding of how market forces can be exploited to create opportunities for the provider.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	high
Marketing Strategy	high
Sales Strategy	high
Offering (Product) Strategy	high
Business Model	standard
Vertical/Industry Strategy	standard
Innovation	high
Geographic Strategy	standard

Source: Gartner

Leaders

Leaders are performing well today, gaining traction and "mind share" in the market, have a clear vision of market direction and are actively building competencies to sustain their leadership position in the market. In an emerging market such as this one, leaders are also looked at as proponents, educators and innovators.

Challengers

Challengers execute well today for the portfolio of work selected, but they have a less-defined view of market direction. In some cases, the challengers have purposely limited their vision and view of the market. This sometimes happens when a technology provider believes that the market is too immature and undefined. Although these technology providers may be the "up and comers" of the future, they may not be aggressive and proactive enough in preparing for the future.

Visionaries

Visionaries help articulate important market trends and direction. However, they may not be in a position to fully deliver and consistently execute. Examples in an emerging market such as this one are smaller startups. They may need to improve their optimization of service delivery.

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Niche Players

Niche players focus on a particular segment of the market, as defined by such characteristics as functional area (that is, sales, marketing or service), vertical industry, and client size or project complexity. Their ability to execute is limited to those focus areas and, therefore, is assessed accordingly. Their ability to innovate may be affected by this narrow focus.

Vendor Strengths and Cautions

Alcatel-Lucent

Strengths

- Alcatel-Lucent's expertise in the telecommunications industry deepens its understanding of quality of service, validation and security, and provides valuable insight into user wants and needs in an SOA environment and the larger cloud-computing arena. (It should be noted that SOA governance is only a fraction of Alcatel-Lucent's overall governance strategy, and its 8550 Web Services Gateway will be leveraged in other areas.)

Cautions

- Marketing and messaging continue to be a challenge, largely due to the offering's nascent position in the SOA governance market and Alcatel-Lucent's overall Dynamic Enterprise message, which sometimes "silos" its SOA governance technology to XML security.

AmberPoint

AmberPoint remains in a leadership position because of its ability to secure customers and because of its strong partnerships with vendors such as SAP, Microsoft and Tibco Software. The company has an impressive ecosystem of partners, resellers, referrals and OEMs, giving it the sheen of a compelling acquisition target. Although Gartner has received no indication that the company will be acquired, clients continue to speculate about its future as an independent solution. Existing and future AmberPoint products include validation and monitoring functionality, which is cutting-edge and visionary.

Strengths

- AmberPoint can continue to rely on its direct sales and partnerships to bring solid revenue and growth.

- The company's validation and monitoring technology is also leading-edge and visionary.

Cautions

- High-profile relationships with Oracle and Software AG have been diminished, but AmberPoint technology continues to work with both sets of technology and can be used as a replacement to the Oracle and Software AG preferred policy management and validation solutions.

- Moving into the next generation of technology, AmberPoint will increasingly find itself in competition with members of its partner ecosystem.

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Fujitsu

CentraSite continues to be among the most functional SOA registry/repositories. Fujitsu is also well-positioned in the important Japanese market, which is starting to pick up on the SOA and SOA governance phenomenon.

Strengths

- The combination of CentraSite, business process management (BPM) and configuration management database (CMDB) solutions keeps Fujitsu relevant in the SOA governance market.

Cautions

- Despite recreated marketing and messaging, Fujitsu has not achieved the success and recognition that its co-CentraSite partner, Software AG, has in the SOA governance technology market.

HP

HP does a good job of integrating acquisitions into its portfolio of products, and is starting to work well with the EDS product service offerings to deliver SOA governance technology. Specifically, EDS has experience establishing centers of excellence and SOA governance best practices.

Strengths

- HP has a solid SOA governance vision, and its community is headed by the Systinet family of products

- HP continues to pursue a successful strategy of remaining platform-neutral and allowing itself to be OEMed by technology providers looking for registry functionality.

Cautions

- HP's messaging around SOA governance (and SOA overall) struggles to be heard in the mix of all the HP announcements.

IBM

IBM has delivered a coherent set of SOA governance messages to the market. WebSphere Enterprise Service Bus (ESB), Message Broker and DataPower can be deployed to drive policy enforcement and service monitoring across service interactions.

Strengths

- IBM and the IBM partner ecosystem not only offer support for various deployment scenarios, but they also help companies with the bigger issues of IT governance organization and strategy.

- The combination of WebSphere Service Registry and Repository (WSRR), DataPower, IBM Tivoli Composite Application Manager, Tivoli Security Policy Manager, WebSphere Fabric (from Webify) and Rational Asset Manager addresses SOA governance, from a technical perspective.

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Cautions

- Segments of the market continue to paint WebSphere DataPower as just a security tool, and WSRR as a tool solely for those with IBM environments and investments. A number of potential customers fail to shortlist IBM for SOA governance in heterogeneous, non-IBM environments.

Intel

This is Intel's first year on the Magic Quadrant, but multiple deployment models, a strong partner ecosystem and high-performance multicore optimizations make it attractive to companies seeking a flexible, proven solution.

Strengths

- Offering more than SOA governance technology (includes mediation and security), and deployed as a software SOA appliance or within VMware, Intel's SOA Expressway makes a compelling tactical SOA solution for intradomain projects.

Cautions

- Intel focuses on security policy enforcement, undoubtedly the expertise of Sarvega (acquired by Intel in 2005), but it should emphasize performance policy management, as well as validation, as part of its messaging and marketing policy management technology.

Layer 7 Technologies

Layer 7 continues to establish and enhance partnerships and OEM agreements with platform vendors. It is also participating in the CentraSite Community and the Governance Interoperability Framework.

Strengths

- Layer 7 actively participates in and implements key SOA policy interoperability standards, which enable it to serve as a bridge between platforms used in large deployments.

- Layer 7 innovates in areas such as federated policy management and governing Web 2.0-style artifacts, and remains one of the last independent vendors in the market.

Cautions

- Layer 7's marketing strategy conflicts with its sales strategy, which leads with XML firewalling. The company must follow through on its messaging and marketing in sales opportunities, or risk becoming pigeon-holed as an XML firewall vendor in the SOA governance market.

Microsoft

Microsoft has hidden governance technologies within the Expressions and Visual Studio communities and technologies. This positions Microsoft well when it comes to managing the life cycle of Web-based artifacts. After careful analysis, which includes understanding the alignment of Microsoft's many divisions and strategies, it becomes clear what the road map is for Microsoft and its governance strategy.

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Strengths

- Microsoft has strong partnerships with AmberPoint and SOA Software, as well as HP SOA Systinet.

- As companies continue to mature their SOAs, the Azure and Oslo strategies will greatly simplify the management and enforcement of policy.

Cautions

- Buyers in this market should have a clear understanding of Microsoft's technology and road map. Microsoft needs to better communicate with the market.

MuleSource

For companies concerned with the cost and complexity of SOA governance technologies, particularly when the adoption and maturity of SOA is low, open-source technology from MuleSource may be the right fit. There's an impressive community of users leveraging MuleSource technology for governance during the design phases of the life cycle. Although well-aware of the importance and impact of governance during runtime phases, MuleSource is purposely aiming its product at consumers concerned with development and composition.

Strengths

- MuleSource's open-source technology is good for companies looking for pragmatic SOA governance technologies, particularly those focused on governance during design phases.

Cautions

- Increasing solutions from platform vendors, and the creative ways in which these vendors are encouraging deployment via minimal licensing and free services, continue to squeeze MuleSource.

Nastel

The years spent working with larger, well-established enterprise system management vendors have enabled Nastel's technology to further close the gaps between SOA infrastructure, SOA governance technologies, CMDBs (see "Three Steps to Determining the Depth and Breadth of CMDB Configuration Items") and other critical system management technologies.

Strengths

- Nastel is the first of many operations-focused technology providers to tailor its products specifically for SOA governance. Autodiscovery of, monitoring, tracking and managing transactions are extremely valuable in understanding dependencies and configurations.

Cautions

- For Nastel to be more successful, it must tailor a messaging, marketing and sales strategy specifically for the SOA governance technology market.

Oracle

Oracle's offerings include various configurations of its SOA governance technologies aimed at companies at various maturity levels. Although "new" to the SOA governance technologies

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market (in the past, Oracle only marketed and sold governance technologies to users with Oracle Application Server or Oracle SOA Suite), Oracle is no stranger to this space.

Strengths

- A substantial amount of SOA governance technology from BEA Systems and Flashline (previously acquired by BEA) has been integrated with other elements of the Oracle portfolio, including Oracle BPM Suite, Oracle SOA Suite and Oracle Service Bus.

- Oracle's SOA policy management is also well-integrated with identity management technologies and directories, and the recent acquisition of ClearApp can address the monitoring requirements of SOA governance.

Cautions

- Oracle is expected to gain further credibility as the market fully consumes its messaging around heterogeneity, cloud computing, validation and monitoring.

Progress Software

Progress Software has a strong ecosystem of partners, including the recently announced relationship with Software AG as a reseller — which is significant because Software AG is also a leader in the SOA governance technologies market. Progress also has the potential to overtake other leaders in this space by exploiting the importance of monitoring in SOA governance.

Strengths

- Progress Software, via its Actional line of technologies, has done a good job of consolidating, amplifying and executing on its marketing message about SOA governance technologies and life cycle management.

- With its recent acquisition of Mindreef, Progress has extended its monitoring and policy enforcement capabilities to include validation and diagnostics.

Cautions

- The company continues to be challenged to be the first and primary vendor in SOA governance deals when customers primarily require a registry/repository (however, channels such Software AG still allow Progress to gain a foothold in accounts, even in these situations).

- Progress needs to continue to work on cross-selling its entire SOA governance portfolio across its large customer base of SOA governance and other application infrastructure customers.

SAP

Strengths

- SAP has full SOA life cycle management capability, supports SAP's integrated service environment and policy management tools, and is the epicenter of SAP's SOA development.

- In an environment that is predominantly composed of SAP business applications, this solution should be shortlisted, especially because the ESR automatically references SAP's portfolio of 3,000 artifacts, processes, data models and schema.

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Cautions

- Technically, SAP ESR can be deployed in non-SAP environments, but Gartner has not seen many examples of this. In fact, we haven't seen any evidence of marketing, and the overall governance message seems to come only from our clients that are heavily invested in SAP.

Sensedia

Strengths

- Sensedia provides a truly independent registry/repository for various artifacts related to SOA and application development. Based in Brazil, and one of the first technology providers of governance there, Sensedia has recently opened offices in North America and quickly closed some impressive deals with marquee companies.

- Sensedia has started to build an ecosystem that consists of non-SOA-related infrastructure vendors, including some from the BPM and business-to-business (B2B) worlds.

Cautions

- Given the harsh economic environment, it is understandable how a recent startup may find difficulty in "blanketing" the market with messaging (reminiscent of early Systinet [now HP Systinet], AmberPoint, Actional [now Progress Software] and Digital Evolution [now SOA Software]). However, in this rapidly expanding and already-crowded market, it's necessary to be successful and grandiose in all market attempts, and, unfortunately, Sensedia has had limited success.

Software AG

Software AG has a strong alignment to its partners (the CentraSite Community), as well as to its own portfolio.

Strengths

- Software AG has successfully transformed itself into an SOA infrastructure company with SOA governance technology, complete with a marquee global client list.

- Strong management and revenue from existing licensing and maintenance protected the company from the subprime crisis, supporting its quarter-over-quarter profitability in weakened economies.

Cautions

- Software AG has an opportunity to consolidate and shift the market, but has yet to do so, taking a cautious and conservative approach to acquisition and development.

Sonoa Systems

Strong, charismatic executive leadership has helped Sonoa land a few key partnerships and high-profile deals, including MTV Networks, which depends on Sonoa to manage its content, which is stored in the cloud.

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Strengths

- Sonoa Systems has made an impact on the SOA governance technology space by messaging the need for governance policy and process enforcement between companies and their cloud providers.

Cautions

- Although Sonoa is well-funded, space for independent vendors is shrinking, and larger independent vendors have a significant "head start."

SOA Software

Strengths

- SOA Software offers a full set of well-integrated governance technologies, and can play a major role in integrating SOA governance technologies with cloud computing.

- SOA Software's strength in the market enables it to challenge best-of-breed providers, as well as platform leaders, in SOA governance deals and multienterprise collaboration deals where service virtualization, validation and policy management are also valuable (policy management and enforcement across a virtual service network are central to SOA Software's ability).

Cautions

- SOA Software targets more-comprehensive SOA governance projects, sometimes giving the market the perception that the solution is costly and complex for smaller governance projects. SOA Software does have technologies to tactically address smaller projects, but must better communicate their availability, simplicity and competitive pricing.

Sun Microsystems

Strengths

- Sun resells Layer 7's technologies.

Cautions

- Sun appears to have abandoned all messaging and marketing of SOA governance.

Tibco Software

Tibco has transformed into an SOA and BPM infrastructure provider. It recently announced that it will OEM SOA governance technologies; specifically, registry/repository and policy management from HP. This will enable Tibco to focus its R&D and acquisition activities on cloud brokering and process governance.

Strengths

- Tibco strengthens ActiveMatrix with governance technologies for SOA and processes. This cohesive architecture across registries/repositories is an essential element of ActiveMatrix.

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Cautions

- A leader in the BPM, B2B and SOA backbone markets, Tibco needs to extend its leadership in newer governance facets, such as process governance, federation and cloud brokerages.

Vordel

Vordel recently announced its governance solution for cloud-based applications. Customers can host the technology themselves, have the solution hosted as a service or both. This is one of the few governance technology solutions that is positioned for the consumer side of the provider/consumer relationship. Besides deployment as a service, Vordel's solutions can be deployed as an appliance or within a virtualized environment. Vordel not only has impressive technology, but it also has an impressive strategy, particularly for cloud computing.

Strengths

- Improved messaging, a global sales and marketing team, and multiple high-profile deals have returned Vordel to the shortlist for policy management, specifically around security.

- Vordel is aggressively building its partner ecosystem and is a current member of the CentraSite Community and HP's Governance Interoperability Framework program.

Cautions

- Vordel needs to increase its marketing efforts not only around its products and vision, but it also needs to increase its efforts to educate the market on the importance of governance interoperability and the role of policy management with respect to the cloud.

WebLayers

WebLayers focuses on all aspects of policy management, including the organization and administration of policy, ownership, policy governance, control over every aspect of the life cycle of any policy and policy enforcement. Valuable in this economic environment, WebLayers offers a unique scoring capability called Impact Weights in its product, which allows customers to monitor and measure key success metrics (such as reuse, interoperability, total cost of ownership and more) for their SOA projects and initiatives.

Strengths

- Although its partner ecosystem is not as large as others, it includes some major players in the SOA governance market, such as IBM, Oracle and HP.

- WebLayers offers a set of out-of-the-box policies and best practices to help accelerate customers' success with SOA.

Cautions

- Establishing and messaging its role and place with regard to the SOA life cycle (for example, WebLayers has a strong set of policy enforcement points called "governors," but this isn't well-known) will enable WebLayers to better compete and become a lead vendor in SOA governance technology opportunities.

RECOMMENDED READING

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

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"Understanding the Criteria, Use and Evaluation Scenarios for the 2009 SOA Governance Technologies Magic Quadrant"

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.

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.

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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 Web site, 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.

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