Gartner

Research

Publication Date: 17 October 2011 **ID Number: G00219233**

Magic Quadrant for SOA Governance Technologies

Paolo Malinverno, Daryl C. Plummer

As service-oriented architecture becomes mainstream and takes on different names, the importance of SOA governance and the technologies related to it keep increasing. The market for SOA governance technologies keeps changing, driven by more comprehensive requirements from end users.

WHAT YOU NEED TO KNOW

Service-oriented architecture (SOA) governance technologies, much like any other set of technologies, are striving to address needs beyond SOA to initiatives not having the SOA label, but are built according to a service-oriented model. Process governance, governing cloud interactions and interactions with business partners (e.g., integration brokerages) are part of the functionality set, or at least are on the radar for most technology providers.

MAGIC QUADRANT

Figure 1. Magic Quadrant for SOA Governance Technologies

Source: Gartner (October 2011)

Market Overview

SOA governance, and the functionality implemented by the technology associated with it, are defined in "What SOA Governance Is and Will Be" and "Understanding the Criteria, Use and Evaluation Scenarios for the 2009 SOA Governance Technologies Magic Quadrant" (*Note: This document has been archived; some of its content may not reflect current conditions.*), and is overviewed in the Inclusion and Exclusion Criteria section.

One major change has occurred in this market since the last Magic Quadrant: Clients today prefer to buy SOA governance solutions that will serve their purpose throughout the whole SOA endeavor, governing services and artifacts through different projects from planning and design all the way to implementation operation and retirement. Two years ago, the majority of clients were

in the market for a partial solution, generally covering only one stage of the service life cycle (the dichotomy between design/implementation and operations was still very much a reality), and possibly a registry/repository coming from a different vendor. This extended focus of SOA governance on a multiyear set of projects has caused sharp changes in the positions of a few vendors that have not extended their coverage either through a direct offering or a partnership.

Governance, as a word, is in fashion. Too frequently today it is used instead of management. As clearly stated in "What SOA Governance Is and Will Be," the two words indicate different things; there are some overlaps, but governance relates more closely to the execution of a business strategy and the attainment of the goals contained (implicitly or explicitly) in it. To enforce governance through everyday decisions, companies devise several policies that must be adhered to, and technology can help a lot here. SOA governance technology is about tracking and monitoring the artifacts in an SOA, enforcing and ensuring compliance with the policies associated with the artifacts and measuring the outcomes related to their use.

The SOA governance market has matured over the past years, and organizations running SOA projects have begun to gain a new level of sophistication in understanding the organizational requirements and vision for SOA deployments (e.g., security and SLAs). Still, the market for SOA governance is varied, with many different types of products providing support to SOA centers of excellence (see "The Four Steps to an SOA Center of Excellence") and architects for governing SOA projects to make sure they deliver benefits. Companies that have solely deployed a registry repository or some policy management technology for a specific life cycle stage (e.g., implementation) are beginning to understand the symbiotic relationship both technologies have with each other.

As pointed out, the vast majority of clients approaching this market today are not looking just for a repository for designing services or a few security policies to make sure some services are consumed only by the right entities. They are also looking for a comprehensive technology partner to cover SOA artifacts from planning to retirement and to assign a changing set of policies throughout their life cycle. Hence, the focus of this Magic Quadrant is on comprehensive solutions, and vendor viability becomes paramount, as SOA projects last several years. Also, a growing percentage of customers is including SOA governance technologies in their initial SOA projects, which has pushed traditional SOA application infrastructure vendors deeper into this market (sometimes with bundled offerings).

Acquisitions in this market have become less frequent, but the market stays complex, with a very wide set of functionality associated with it; several vendors offer products sets addressing different and often-overlapping stages of the SOA artifact life cycle. Frequently, the products are either coming from acquisitions or as OEMs from competitors (see "Market Profile: SOA Governance Infrastructure 2011").

The job of integrating SOA governance among disparate domains remains complex; 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, SOA governance standards and specifications continue to be immature and standardization activities have somewhat stopped (see "'That's All' for Web Services"). Ensuring that your vendor participates in some governance interoperability specification and has conducted interoperability tests with the other technologies you run can substantially help ease deployments in best-of-breed situations, where, for example, technologies for design and runtime policy enforcement are procured from different providers.

The on-premises software for the SOA governance technologies market was worth around $400 million in 2010, having grown steadily (over 10%) for years. We expect that growth to continue, albeit being overrun by the growth of SOA governance services in the cloud in the short term.

More market information for SOA governance technologies can be found in "Forecast: Enterprise Software Markets, Worldwide, 2008-2015, 3Q11 Update" (to get to the Pivot Table for Analysis, select Application Infrastructure and Middleware for Market and SOA Governance Technologies for Submarket).

Market Definition/Description

The applicability of SOA governance technology has also expanded considerably, and is likely to continue to do so, mainly because of cloud and multienterprise B2B.

In general, current, on-premises SOA governance solutions can be used to govern services implemented in the cloud. Also, current solutions can be hosted on cloud platforms, such as Amazon Elastic Compute Cloud (Amazon EC2). However, the vast majority of solutions do not support multitenant registries and repositories, or multitenant policy management when hosted in the cloud. This type of solution, frequently part of a wider integration platform as a service (iPaaS) offering (see "Integration Platform as a Service: Moving Integration to the Cloud"), is planned by most vendors, but implemented only by a few. This capability is fundamental to enable the model of cloud services brokerages (see "The Delicate Side of Cloud Services Brokerages: Governance") that is emerging in the industry and that a handful of vendors in this market is leveraging already. A lot of B2B infrastructure providers have been cloud services brokerages for a long time and now understand the need for governance in their platforms.

SOA governance in the cloud also overlaps consistently with API management, the combination of services enabling organizations to deploy, intermediate, govern, catalog and secure public Web APIs based on Web-oriented architecture (WOA) principles (see "Tutorial: Web-Oriented Architecture: Putting the Web Back in Web Services" [*Note: This document has been archived; some of its content may not reflect current conditions.*]), mainly for the use of mobile applications. Some vendors have seen this overlap, and play effectively in both the SOA governance and API management markets. In the future, as the use of software as a service (SaaS) applications grows and on-premises applications increasingly combine functionality coming from different providers in the cloud, a lot of SOA governance technology (like repositories or specific operational policies) will move from on-premises to the cloud, frequently outsourced to a cloud services brokerage. This is the main reason why planned cloud functionality was given so much attention in this Magic Quadrant.

The availability of professional and consulting services for the effective usage of SOA governance technologies throughout the stages of SOA (see "Gartner's Four Styles of SOA") and the provision of related organizational advice are other key factors for success in this market. This Magic Quadrant is about SOA governance technologies, so the availability of professional and consulting services is not a main or explicit product evaluation criterion. However, professional and consulting services are so important in the delivery of an SOA governance technology offering that their availability makes the vendor's offering more complete, and builds into the vendor's ability to execute and vision.

Since the publication of the last SOA governance technologies Magic Quadrant, vendors have evolved in different ways; some have stretched to cover more life cycle functionality, some have stayed focused on the stage they do best (and generally partnered for others) and some have simply given up and exited the market. This research addresses very carefully this point of evolution of focus, as it significantly impacts vendor viability.

As SOA becomes more mainstream, applications architected according to SOA are becoming the norm. SOA is an architecture; it is not bound by specific technology types. SOA is frequently associated with WS-* protocols, but can be implemented in many other ways (e.g., representational state transfer [REST] or message-oriented middleware). SOA increasingly enables application functionality to be sourced from the cloud (private or public), instead of

applications on-premises. Packaged application vendors are taking SOA for granted more and more, and ship their functionality in services. The number of APIs available publicly grows by the day, their usage multiplied by a growing population of mobile devices. As SOA governance weaves itself into more general, architecture-dependent application governance, its name is becoming too restrictive and will need to change. As SOA moves toward the Slope of Enlightenment on the Hype Cycle (see "Hype Cycle for Application Architecture, 2011"), people talk less about SOA and take it for granted, overlooking that SOA is what allows them to use functionality in the cloud within their applications.

SOA governance as a term is already a bit reductive and debatably out of fashion, and some vendors might feel it is not a good fit for the way they position their companies. However, it is still accurate to use the term SOA, because that is the application architecture used, and the technology that supports it will be around for quite a few years, albeit with some changes. Therefore, Gartner has decided to keep this Magic Quadrant's name unchanged, at least for this iteration, while the industry undergoes (mostly cloud-induced) changes.

The market for SOA governance is still largely untapped, with most organizations not applying formal governance during their SOA endeavors, so its potential for growth is still high. Also, governance procedures typically take a long time to be devised, agreed on and applied in organizations, so SOA governance applicability is likely to stay high for the long term: The maturity of the market is still low, and it will take a few years to reach its potential. As stated in "Gartner's Four Styles of SOA," SOA governance becomes imperative for organizations beyond an incidental SOA style.

More trends and information on SOA governance technology vendors can be found in "Market Profile: SOA Governance Infrastructure 2011."

Inclusion and Exclusion Criteria

Vendors included in this Magic Quadrant on market SOA governance technology, as defined in "What SOA Governance Is and Will Be," are bundled with a wider SOA platform offering or offered independently. Contrary to previous versions of this Magic Quadrant, to be included in this study, they have to realize a minimum revenue of $10 million in this market (in some cases, exceptions are made for vendors that have the potential to significantly impact the SOA governance technology market). All vendors considered in this Magic Quadrant have articulated a cloud strategy, and have provided evidence that they have started to execute it.

Also, to be considered for this Magic Quadrant, vendors must market *comprehensive* technology for SOA governance policy management, and/or around registries and repositories across the artifact (service or other type of reusable) life cycle, from planning through design, operation, maintenance and retirement. As mentioned, most clients are looking for solutions that will support them throughout the span of their SOA projects. Thus, this Magic Quadrant does not consider vendors that market only partial solutions (e.g., a specific type of operational policy management process or an enterprise service bus [ESB] that only exposes data relevant to some governance policies, or simply SOA testing), and are not partnering with other vendors or delivering the OEM technology to cover the rest of the artifact life cycle or other types of policies.

More details on the inclusion criteria are contained in "Understanding the Criteria for the 2011 SOA Governance Technologies Magic Quadrant."

Added

Four vendors have been added to this Magic Quadrant:

- **Crosscheck Networks** and **Managed Methods** have both grown in importance, functional offering, size and market weight in the past years.
- **Mashery** has clearly emerged as a primary vendor in the API management market, is aware of and leverages the overlap with SOA governance in the cloud, and has articulated an effective offering to address the business side of the technology it sells.
- **WS02** has gone well over (especially in policy management) what other open-source offerings do in SOA governance.

Dropped

As mentioned, since the publication of the last SOA governance technologies Magic Quadrant, vendors have evolved in different ways, which in some cases meant exclusion from this Magic Quadrant:

- **Alcatel-Lucent** is refocusing and updating its offering.
- **Apigee** (which changed its name from Sonoa Systems in the previous version of this Magic Quadrant) has focused sharply on the technology side of API management, and does not believe the functionality it offers has much to do with SOA governance.
- **Fujitsu** has refocused its offering on application life cycle management.
- **Sensedia** has been growing consistently since the last Magic Quadrant, but its current size does not grant inclusion in this Magic Quadrant, per the published criteria.
- **WebLayers**' current size does not grant inclusion in this Magic Quadrant, per the published criteria.

The particular need for full life cycle governance for both registry/repository and policy management means several vendors that offer partial functionality across that spectrum are not included in this research:

- **Microsoft** offers only registry functionality.
- **MuleSoft** (which changed its name from MuleSource in the previous version of this Magi Quadrant) offers only limited registry and repository functionality.
- **Nastel** mainly offers application performance management functionality.
- **SAP** offers only SAP-specific repository functionality.
- **Sun Microsystems** and **AmberPoint** do not appear because they were both acquired by Oracle.

It is worth mentioning two more vendors that were not in the previous version of this Magic Quadrant, but were initially considered for this study:

- **Cast** offers generalized application software analysis and measurement (non-SOA-specific).
- **TmaxSoft** offers legacy modernization and SOA-based development.

These vendors offer functionality around SOA governance, but their target market does not match it, so they were not included in this Magic Quadrant.

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.

More details on the criteria (see Table 1) for the ability to execute in SOA governance is contained in "Understanding the Criteria for the 2011 SOA Governance Technologies Magic Quadrant."

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability (Business Unit, Financial Strategy and Organization)	High
Sales Execution/Pricing	Standard
Market Responsiveness and Track Record	Standard
Marketing Execution	Standard
Customer Experience	High
Operations	Low

Source: Gartner (October 2011)

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, and 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.

More detail on the criteria (see Table 2) for Completeness of Vision in SOA governance is contained in "Understanding the Criteria for the 2011 SOA Governance Technologies Magic Quadrant."

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Standard
Sales Strategy	Standard
Offering (Product) Strategy	High
Business Model	High
Vertical/Industry Strategy	Low
Innovation	High

Evaluation Criteria	Weighting
Geographic Strategy	High

Source: Gartner (October 2011)

Leaders

A Magic Quadrant represents Gartner's judgment of vendors' ability to execute and the completeness of their vision in a technology market (in this case, the SOA governance technology market). The Ability to Execute criteria reflect the staying power and record of execution of vendors in the market. The Completeness of Vision criteria reflect vendors' ability to understand market trends and lead and influence them, and to follow these trends with agility and consistency.

Vendors that are strong in their execution and ability to lead and influence the market are labeled market Leaders. The most recent players in the market that have a limited record of execution, and well-executing vendors that are overly cautious on innovation and risk, are less likely to be Leaders. **A word of caution**: By its nature, a vendor rating process favors comprehensive offerings and powerful sales and marketing strategies. A tightly focused product, even if exceptional, typically will not score as well as a comprehensive offering supported by strong sales and marketing strategies in this analysis. This, in turn, frequently favors the larger vendors, because their extended resources allow them to allocate substantial sales and marketing investments to support their SOA governance products, and to offer the more comprehensive collections of functionality.

In most cases, projects are looking for a functionally complete SOA governance technology set; you will find the Magic Quadrant to be the most helpful. However, if your search is for a specific subset of capabilities, the best-fit offering for your project might be underrated in the Magic Quadrant. Users should apply a considered judgment and should understand Gartner evaluation criteria and weights, listed above, in order to take the best advantage of this research. The Magic Quadrant can be seen as an arranged "longlist" of vendors for a given market. Devise your own shortlist based on your organization's specific circumstances and requirements. Use this Magic Quadrant as one point of input, not as the sole deciding criterion.

Leaders in this market are of two types:

- Large or megavendors that through acquisitions or partnerships have collected the massive amount of functionality needed to properly govern an SOA stream of projects from inception to the long term.
- Small, SOA-governance-focused nimble players that master the full set of functionality needed, and will keep moving quickly to keep up with new functionality and service demands.

To be a Leader today, a vendor must address the majority of the service/artifacts life cycle stages with a strong repository, as this is what the bulk of clients are buying. As SOA becomes the norm in applications, people will talk about it less, but the notion of service implemented on-premised or in the cloud and used by a local application or via the website of a partner or a mobile application is becoming commonplace. Paradoxically, people will discuss SOA less, but will implement and use services more (see "Mobility, Cloud and Multicore Systems Are Changing Application Architectures"); that's where SOA governance kicks in. A vendor does not necessarily need to sell an SOA application infrastructure or talk about SOA a lot in its marketing to be a Leader in this space; it just needs to have enough functionality to govern services in whatever shape or form (Java methods, Web Services calls, REST APIs and many more) they come, across several life cycle stages.

Challengers

Challengers execute well today for the portfolio of work for which they have functionality, but have a blurred or incomplete view of market direction. In some cases, Challengers with a large installed base have purposely limited their vision and view of the market, because for one reason or another they decided not to expand their product line. This sometimes happens when a technology provider believes the market is too immature and undefined to fully venture into it. In other cases, the focus in addressing (or marketing) SOA governance issues systematically might not be completely there, because the vendors focus on or come from other similar markets. 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 now.

Visionaries

Visionaries typically approach this market with a fresh view from an innovative angle, and are big into the cloud. While they typically feature an incomplete set of functionality, they have the power and the mind share to grow that set for the customers to come, often in a different way from established Leaders; visionaries carry no baggage. In a market stretched by several waves of transformation (cloud, the increased maturity of clients, the changing concept of application, different development styles, evolving organizational arrangements, ever-growing B2B multienterprise process requirements, to name a few), most future Leaders will be former Visionaries.

Niche Players

Niche Players focus on a particular segment of the market, typically defined by a specific life cycle stage (e.g., operations) or by other characteristics, such as vertical industry, client size (and spending power), geographic area, advanced functionality required (e.g., performance or security) or project maturity/complexity. In some cases, this narrow focus on a particular segment of the market might be a conscious strategic choice, and in that niche their offerings might be more functional than the leaders; in others, just a sign that the vendor is maturing, and that its offering is being extended. Niche Players' ability to execute is limited to those focus areas and, therefore, is partial and is assessed accordingly. Their ability to innovate and, to a greater extent, to survive in this market, is affected by their narrow focus.

Vendor Strengths and Cautions

Crosscheck Networks

Crosscheck Networks and its wholly owned subsidiary, Forum Systems (acquired in May 2009), offer a product suite for SOA governance that encompasses development, testing and secure integration of services and artifacts within and external to enterprises. Crosscheck markets SOAPSonar, Forum Sentry, CloudPort and Forum STS, which span service design to implementation and operation. Each product comes with a simple repository, and runs in the cloud on a single-tenant basis. Crosscheck mainly sells in North America, and is expanding its direct presence in Europe.

Strengths

- Good coverage of the service life cycle in general, and of security policies in particular.
- Focuses on usability, with good functionality, at an attractive price point.
- Extensive integration capabilities with third-party ESBs and monitoring consoles.

Cautions

- Not very visible in the market, due to its size and initial marketing activities.
- Limited R&D and sales power.
- Simple repository, integrates with third-party fully functional offerings like HP Systinet, IBM WebSphere Service Registry and Repository, and Software AG CentraSite.

HP

HP (through the acquisition of Mercury and Systinet) is a historic player in this space, building its position through years of experience in registries and repositories. HP SOA Systinet offers a set of design and implementation policies, and a full life cycle registry and repository, which is widely OEMed by other vendors in this space. HP SOA Systinet can be run in a cloud infrastructure on a multitenant basis using access policies. HP's offering is sold worldwide.

Strengths

- Traditional player in this market since it started, with a good number of significant customers.
- Platform-neutral.
- Several OEM agreements, most of which work well.

Cautions

- Mainly addresses design/implementation policy management only (no operational policies in the box).
- Has not advanced its offering (e.g., for runtime policy management) in pace with the widening of market requirements.
- Systinet's voice is hard to hear amid all the other HP offerings.

IBM

IBM packages its comprehensive SOA governance functionality in several products: WebSphere Service Registry and Repository Advanced Lifecycle Edition, WebSphere DataPower, IBM Tivoli Monitoring, IBM Tivoli Composite Application Manager and Rational Asset Manager being the main ones. At present, IBM is gradually making its products available in the cloud. IBM's offering is sold worldwide.

Strengths

- Established and powerful market position and solid customer base in several vertical industries.
- Complete and competitive product line.
- Powerful consulting service organization, with associated methodologies.

Cautions

- End-to-end life cycle functionality is enabled across different, sometimes overlapping products.

- Slow to react to adjacent industry trends (e.g., API management).
- Perceived as a high-cost solution.

Intel

Intel markets a software or hardware gateway solution to accelerate, secure, integrate and route XML and Web services under the name of McAfee/Intel Expressway Service Gateway. The gateway mainly implements runtime operational security policies and has no repository on its own, but integrates with third-party fully functional offerings like Oracle Service Registry, IBM WebSphere Service Registry and Repository, SAP Enterprise Services Registry and Repository, and Software AG CentraSite. The software is not multitenant, but the appliance can be virtualized. Intel's offering is sold worldwide.

Strengths

- Intel is a very powerful brand, and its products are in use in very large organizations worldwide.
- McAfee/Intel Expressway Service Gateway has proved to address very demanding, performance-hungry, security-heavy scenarios.
- The recent McAfee acquisition will give the McAfee/Intel Expressway Service Gateway product line more options, and new sales channels, with good potential.

Cautions

- The solution addresses security-heavy operational policy management, so users need to augment this on a best-of-breed basis if wider coverage of policies or service life cycle is needed.
- As SOA governance solutions stretch to cover more functionality, it is legitimate to question Intel's commitment to the whole SOA governance technology market.
- Lack of impact and visibility in the current Intel SOA governance technology marketing activities.

Layer 7

Layer 7 offers security and governance for SOA, Web APIs and the cloud through a family of products called SecureSpan (CloudSpan in the cloud). Policies are implemented by Policy Manager (an integrated development environment [IDE]-like editor) and tracked by Enterprise Service Manager. Layer 7 offers a lightweight registry and repository, but for more advanced repository functionality Layer 7 integrates with third-party offerings like HP SOA Systinet, Oracle Service Registry, IBM WebSphere Service Registry and Repository, and Software AG CentraSite. Layer 7's offering in the cloud is already used by cloud services brokerages. The company mainly sells in North America, and increasingly in Europe.

Strengths

- Fairly complete offering, with good coverage of general SOA governance (on-premises and in the cloud), B2B, ESB and API management functionality.
- Fast-moving, well on its way to implementing its good vision for SOA governance and the related marketplaces.
- Extensive online and traditional marketing.

Cautions

- Growing well, but still small in size.
- Lacks advanced repository features (such as support for non-policy-related artifacts).
- Limited sales power, especially in Europe and emerging markets.

Managed Methods

Managed Methods markets a runtime and operational policy management solution, JaxView. Managed Methods has no repository on its own, but integrates with third-party fully functional offerings like Oracle Registry and Repository, IBM WebSphere Service Registry and Repository, and Software AG CentraSite. Managed Methods' multitenant cloud offering is called CloudGate, and already has several clients. The company mainly sells in North America, and plans to target Europe more aggressively.

Strengths

- Reasonably functional, small footprint solution attractive to small and midsize businesses, especially in the cloud, with multiple runtime deployment options (gateway, agents or sniffer) for architectural flexibility.
- Well on its way to executing an effective cloud strategy, and addressing API management, too.
- Clear and public pricing.

Cautions

- Limited functionality — only operational policy management and no repository.
- Not very visible in the market, due to its size and initial marketing activities.
- Just breaking out of the North American market.

Mashery

Mashery is at the forefront of API management, and its cloud-centric offering features several areas of functionality that fall under the SOA governance umbrella. Mashery offers a wide set of policies that spans the whole service/API life cycle, with particular attention to operational issues. Mashery also offers a simple repository, mainly to facilitate the reuse of services/APIs. Being a cloud-only offering, Mashery, in theory, is available worldwide (and has some traction with clients in the U.K.), but the majority of its clients are in the U.S.

Strengths

- Even if SOA governance does not occur frequently in Mashery's vocabulary, it has a solid vision and good potential in this market (and others, like multienterprise B2B).
- Product architected and built for multitenancy and the cloud.
- Features a scalable business model (which includes a cloud services brokerage role), and is very responsive to new market requirements.

Cautions

- Competition in the API management market is mounting, especially from SOA governance technology fast-moving leaders, like SOA Software and Layer 7.
- Mashery, as a company, is still a very young entity, relying on investors' funding.
- Limited sales and support power outside North America.

Oracle

Oracle's SOA governance offering is part of its wide product line for SOA application infrastructure (Oracle Fusion Middleware). Full life cycle policy management is packaged in Oracle Enterprise Gateway and Oracle Web Services Manager, which are integrated with Oracle Enterprise Repository, Oracle Service Registry and Oracle SOA Management Pack. Policy management can be run on a cloud infrastructure, while the repository supports multitenancy today. Also, SOA governance in the cloud is part of Oracle's wider plans for platform as a service (PaaS) for public cloud. Oracle's offering is sold worldwide.

Strengths

- Governs applications beyond SOA (Oracle packaged apps) and is well-integrated with its own SOA application infrastructure products (Oracle Fusion Middleware).
- Established company market position and power.
- Functionally rich, especially after the AmberPoint acquisition and Vordel's agreement on Oracle Enterprise Gateway.

Cautions

- Complexity of offering, due to the variety and number of related Fusion Middleware products.
- SOA governance messages are hard to hear amid Oracle's SOA marketing messages.
- No SOA governance dedicated sales force; SOA governance is generally sold with other Oracle SOA and application infrastructure products.

Progress Software

Progress Software offers mostly operational policy management with Progress Control Tower and Actional Management Server. Progress also recently introduced a repository offering (with several functional enhancements planned) and announced plans for SOA governance in the cloud through a product called Arcade. Progress's offering is sold worldwide.

Strengths

- Good history of acquisitions (Actional and Mindreef), which generally get integrated/leveraged well.
- Promising capabilities and vision to bring IT and business users together for a collaborative view of SOA governance.
- Fits well in a mixed environment; interoperates with a long list of different technologies coming from different vendors.

Cautions

- SOA governance offering is one of many in Progress's roster, with complex-event processing and business process management (BPM; intelligent business operations) consuming the majority of marketing cycles.
- Late jumping on the cloud train.
- Still mostly an operational policy management vendor.

Software AG

Software AG brings to the SOA governance market a flagship repository with planning, design and implementation policy management, CentraSite and further policy management with Software AG Mediator, Software AG Insight (OEMed from Progress) and Layer 7's SecureSpan. Software AG is rolling out a comprehensive cloud strategy, but at the moment its offering can be run on a cloud infrastructure only with single tenants. Software AG's offering is sold worldwide.

Strengths

- CentraSite is a well-established offering, with about 60 vendor partners.
- SOA governance is at the center of Software AG's offering and vision for the future.
- Software AG's marketing and sales are very powerful, and leverage solid SOA, BPM, event processing and professional service offerings (all well-integrated with CentraSite) effectively.

Cautions

- Leveraging offers from competitors (Progress Software and Layer 7) to complete its product line; depending on competitors' offerings is a risky strategy in a dynamic market like this.
- Late jumping on the cloud train.
- Very cautious, not a fast-moving vendor and approaching megavendor size.

SOA Software

SOA Software is an established player in the SOA governance market in North America, offering full life cycle policy management with Policy Manager, Portfolio Manager, Repository Manager and Service Manager, each of them sharing a portion of the repository. Most SOA governance in the cloud functionality is being rolled out in the Atmosphere product line. SOA Software mainly sells in North America, and has started expansion to Europe, Australia and South Africa

Strengths

- Leading market understanding and vision for SOA governance.
- Fast-moving vendor, with comprehensive and well-integrated offering and effective top-line marketing.
- Interoperates well and partners with IBM, JBoss, Microsoft and SAP.

Cautions

- Limited R&D and sales power; support only in English.
- Somewhat confusing packaging (products coming from acquisitions — Blue Titan and Logic Library).
- International capabilities are still under construction.

Tibco Software

Tibco Software is an established middleware, integration and SOA application infrastructure vendor. For SOA governance, it offers ActiveMatrix Lifecycle Governance (design OEMed from HP Systinet, includes registry and repository), ActiveMatrix Policy Manager (operation) and ActiveMatrix Service Performance Manager (organization). Tibco is delivering an iPaaS called Silver, which has SOA governance built into the platform. Tibco's offering is sold worldwide.

Strengths

- Established international integration vendor, with lots of cross-selling opportunities.
- Reasonably complete offering and good functionality range.
- Solid R&D and support groups are behind the product.

Cautions

- Limited marketing and sales force attention; SOA governance is generally sold with other Tibco's products.
- Limited vision of the market for a leader in this space.
- Limited innovation power and market responsiveness.

Vordel

Vordel offers fast, safe connectivity for SOA and cloud services. In SOA governance, it offers Gateway, Reporter and Policy Director, supporting all service/artifact life cycle stages. It also offers a simple repository for policy metadata data only; for the rest, it integrates with HP Systinet, Oracle and WebSphere Service Registry and Repository. Vordel's gateway can be deployed on a cloud infrastructure, but is not available yet as a service. Vordel's main market spans Europe and North America.

Strengths

- Good span of security policies and XML features available in software and on an appliance.
- Has grown considerably overall as a company since the last Magic Quadrant.
- Truly an international vendor, despite its size.

Cautions

- Limited R&D and sales power.
- Not very visible in the market, due to its size and limited marketing reach.

- Does not directly offer repository or registry (integrates with third-party offerings, per above).

WS02

WS02 is an open-source vendor that approaches SOA governance from an iPaaS/cloud-enabled application platform (CEAP) angle. The on-premises offering is called Carbon, and the cloud offering is called Stratos: they both cover the design, implementation and operation of services. WS02's governance registry is a functional repository, too. WS02's offering is sold worldwide.

Strengths

- Good understanding, vision and leverage for SOA governance in the cloud, including the social side.
- Offering is particularly suited to ISVs; well-proved business model, with effective professional services attached to it.
- Technology is natively multitenant.

Cautions

- Limited sales power (small sales group in Sri Lanka), even taking into account that it doesn't have the usual license-based sales cycle.
- Wide SOA infrastructure product line, for a company of its size and R&D power.
- Not very visible in the market, due to its size and initial marketing activities.

RECOMMENDED READING

Some documents may not be available as part of your current Gartner subscription.

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

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

"Market Profile: SOA Governance Infrastructure 2011"

"What SOA Governance Is and Will Be"

"The Four Steps to an SOA Center of Excellence"

"'That's All' for Web Services"

"Forecast: Enterprise Software Markets, Worldwide, 2008-2015, 3Q11 Update"

"Integration Platform as a Service: Moving Integration to the Cloud"

"The Delicate Side of Cloud Services Brokerages: Governance"

"Tutorial: Web-Oriented Architecture: Putting the Web Back in Web Services"

"Gartner's Four Styles of SOA"

"Hype Cycle for Application Architecture, 2011"

"Understanding the Criteria for the 2011 SOA Governance Technologies Magic Quadrant."

"Mobility, Cloud and Multicore Systems Are Changing Application Architectures"

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.

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.

REGIONAL HEADQUARTERS

Corporate Headquarters
56 Top Gallant Road
Stamford, CT 06902-7700
U.S.A.
+1 203 964 0096

European Headquarters
Tamesis
The Glanty
Egham
Surrey, TW20 9AW
UNITED KINGDOM
+44 1784 431611

Asia/Pacific Headquarters
Gartner Australasia Pty. Ltd.
Level 9, 141 Walker Street
North Sydney
New South Wales 2060
AUSTRALIA
+61 2 9459 4600

Japan Headquarters
Gartner Japan Ltd.
Aobadai Hills, 6F
7-7, Aobadai, 4-chome
Meguro-ku, Tokyo 153-0042
JAPAN
+81 3 3481 3670

Latin America Headquarters
Gartner do Brazil
Av. das Nações Unidas, 12551
9° andar—World Trade Center
04578-903—São Paulo SP
BRAZIL
+55 11 3443 1509

Gartner