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ESB Open Source Challenge

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Theme

Is the ESB Market an
Open Source Opportunity
for software vendors?

Agenda

- **The ESB Market**
- What's Special
- Strategic Decision

Evaluation Criteria

An ESB is: Infrastructure software that makes reusable business services widely available to users, applications, business processes, and other services.

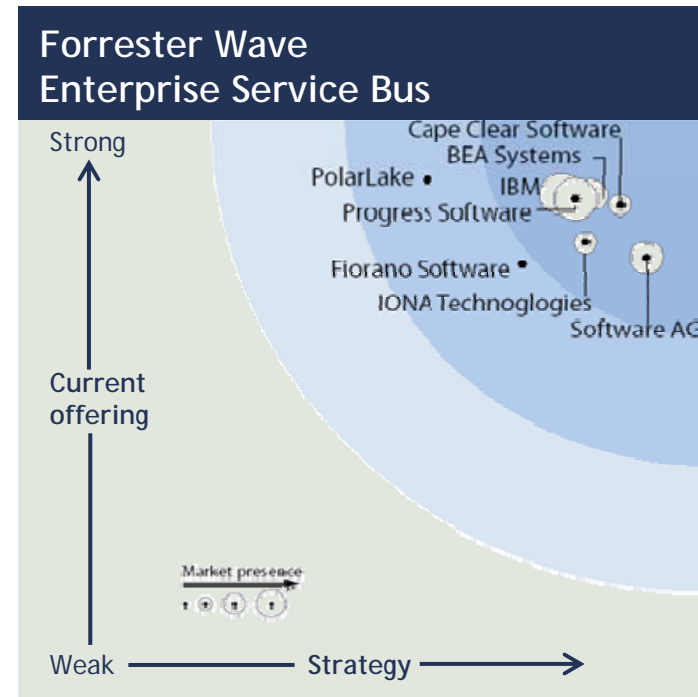
CURRENT OFFERING	
Connection	How sophisticated is the enterprise service bus' (ESB) support for messaging and connectivity?
Mediation	How rich a set of mediation services and capabilities does the product provide?
Control and change	What capabilities does the ESB provide in the area of control and change management?
STRATEGY	
Product strategy and vision	How strong is the vendor's product strategy and vision?
Strategic alliances	How strong are the vendor's strategic alliances?
Corporate strategy	How strong is the vendor's corporate strategy?
Solution cost	What is the relative cost of the vendor's ESB solution?
MARKET PRESENCE	
Installed base	How large is the vendor's installed base of customers for this product and all products?
New customers	How many customers are buying or upgrading any version of the product?
Delivery footprint	What is the vendor's method of delivery?
Financial viability	How strong is the vendor's financial position?

Current Commercial Player

Open Source ESBs
are not yet leaders!

Every mature IT-Market has
competition between
Commercial and Open Source
license models.

Open Source ESBs matured
significantly in 2007



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Source: The Forrester Wave™:
Enterprise Service Bus, Q2 2006
by Ken Vollmer and Mike Gilpin.

Open source ESBs

- JBoss ESB
- Sun OpenESB
- IONA Celtix (Apache CXF)
- MuleSource Mule
- Apache Synapse
- Sopera (Eclipse)

JBoss ESB

- Based on Rosetta donated by a large insurance company June '06
 - » Developed using JBoss Enterprise Middleware Suite
- Current version is 4.0
- 20+ community members @ JBoss.org
- Supports several messaging services (JBoss messaging (JMS), IBM MQ Series)
- JBI support, SCA considered
- Web services support
- Multiplexed buses – everything is a service
- Vision:
 - » Process orchestration
 - » Protocol translation
 - » Adapters
 - » Repositories (e.g., UDDI)
 - » Change management (hot deployment, versioning, lifecycle management)
 - » Quality of service (transactions, failover)
 - » Quality of protection (message encryption, security)
 - » Management (versioning of services)

Sun's OpenESB

- Project initiated by Sun with JBI the foundation
- V 2.0 downloadable from java.net
- Runs on project glassfish, JBoss, Sun app servers
- Java EE Service Engine transparently registers EJB or Web Application web service endpoints with the Open ESB runtime
- Some other runtime binary licenses required
- Containers interconnected with Normalized Message Router
- 312,000+ LOC, 19 contributors
- CDDL moving to GPL

IONA: Celtix Enterprise

- CXF 2.0 is an Apache project based on Celtix + XFire
- Celtix Enterprise is IONA product based on CFX
- Bundles related projects together into one distribution
- Documentation, examples, support, consulting training
- Focus: new customers and new revenue stream
- Contribute back to the CXF project
- LogicBlaze adds additional capabilities to Celtix Enterprise such as BPEL-based orchestration along with test suites, IDE, etc.

Mule from MuleSource

- Seems to be the most widely used open source ESB
- MuleSource claims hundreds of mission-critical installations
- 150+ Production deployments, including: JP Morgan, AA, Citigroup, McKesson, Expedia, Yum Brands
- Simple, easy, small footprint
- Designed to support high performance multi-protocol transactions
- Platform support: Linux: Red Hat, Fedora, Debian, Ubuntu, Windows, Solaris, MacOSx
- J2EE containers: Tomcat, Jetty, JBoss, WebLogic, Websphere, Oracle
- Active recruitment of outside committers; 21 Developers; 9 in March
- 392,370 lines of code
- 323 commits in March
- MPL+ attribution license
- WS-BPEL from other components (e.g. Intalio)

Apache Synapse Project

- Began incubation in 2005
- Graduated as sub project of Web Services project in January 2007
- 84,000+ LOC from 12 committers
- Version 2.0 currently available, added:
 - » Support for Registries
 - » Support for WS-Security/RM
 - » Support for fault handling
 - » Support for monitoring/statistics
 - » Documentation, Usability
 - » More examples and an example suite
- Commercial support from WSO2

Sopera

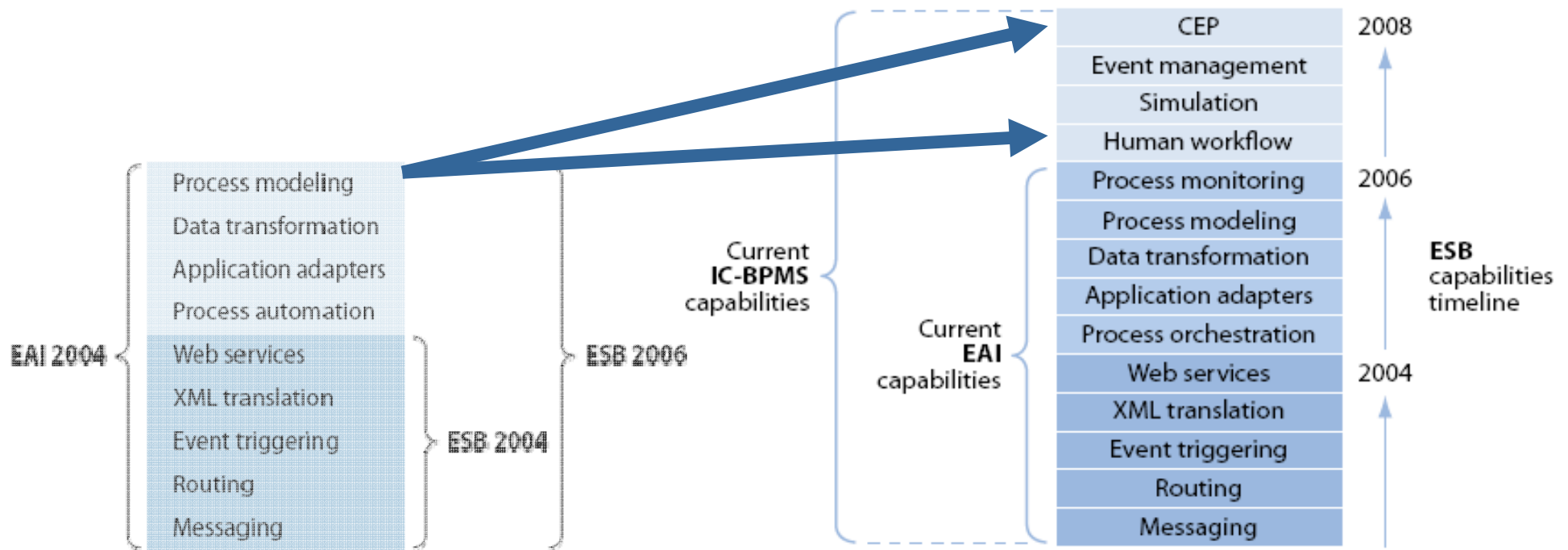
- Development started seven+ years ago in Deutsche Post Mail
- Spin-off to Sopera GmbH in 2007
- Sopera offers currently a freeware version
- A “real” open source version under Eclipse license is planned.
- Sopera is main committer to the Eclipse ESB project.
- Customer number outside Deutsche Post unknown

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What's special to the ESB Market?

Capabilities are still emerging!



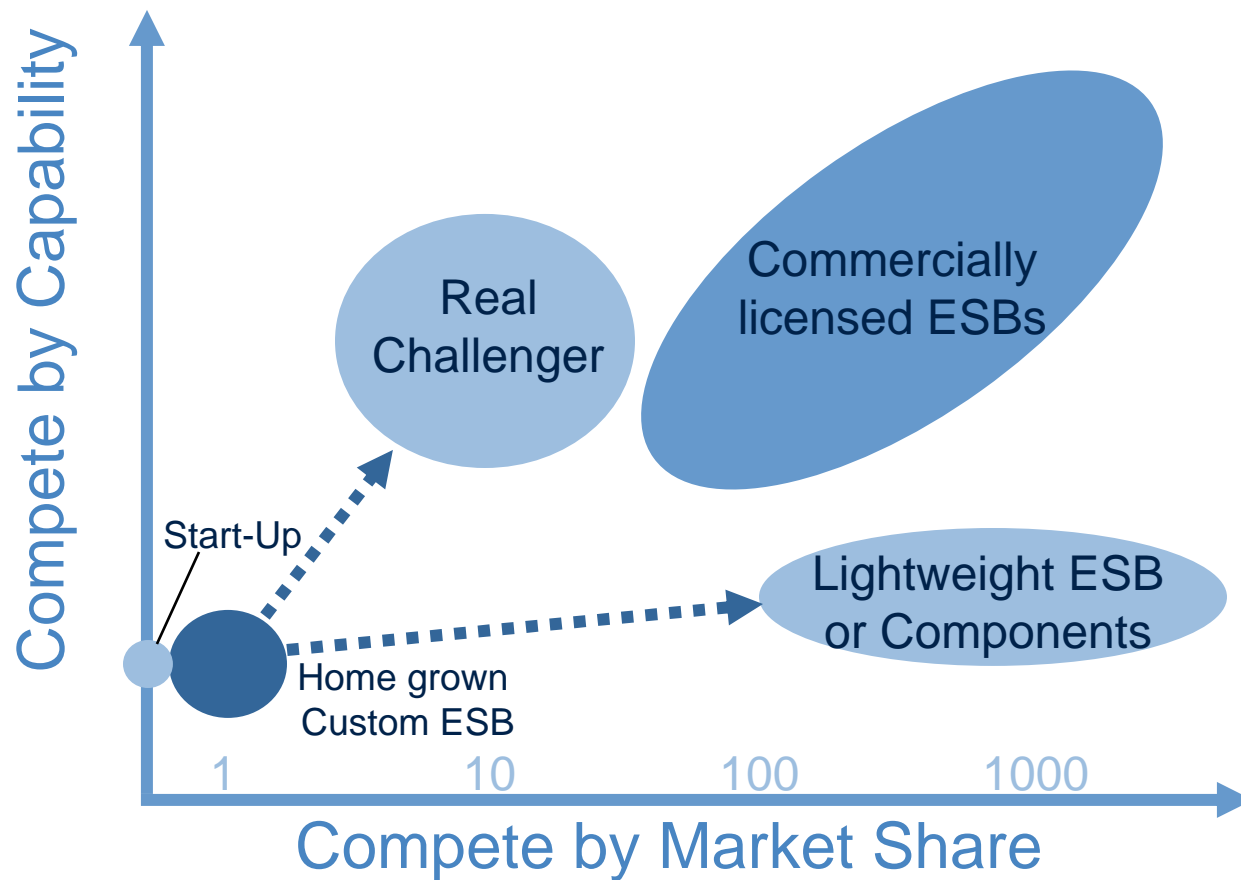
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**INNOVATION IS STILL A DIFFERENTIATOR
IN THE ESB MARKET**

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- **Strategic Decision**

Opportunities in two Business Models



OPEN SOURCE ESB VENDORS HAVE TO DEFINE AND COMMUNICATE THEIR BUSINESS MODEL

ESB Vendor Strategy Recommendation

- Become comprehensive or widely adopted
 - » Implement EITHER the “Real Challenger” OR the “Lightweight” Open Source Strategy
- As a Challenger: Complete your product
 - » Select the right partnerships
 - » Merge with other Open Source companies
 - » Focus on selected reference customers
- As a Lightweight ESB:
Select a license model with Marketing Momentum
 - » Eclipse or Apache
 - » Drive Mass Adoption

End User Recommendations

- Critically evaluate your requirements to determine must haves and nice to haves
- Take advantage of open source accessibility and try out the ESBs that look interesting
- Make sure that the open source vendor strategy fits to your expectations
- Make sure support is commercially available
- If you decide to go open source, be prepared to participate in the community

Selected Bibliography

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- Learn How To Embrace Lightweight ESBs, by Mike Gilpin and Larry Fulton, Forrester Research, September 12, 2007
- Forrester Teleconference: “Open Source Enterprise Service Bus Products”, by Michael Goulde, June 2007
- Claiming ground against the ESB gorillas, by Dr. Stefan Ried and Thomas Mendel, Forrester Research, January, 2007*

* to be published

Thank you

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