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## EXCERPT

# Worldwide Job Scheduling Software 2010 Vendor Shares

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## IN THIS EXCERPT

The content for this excerpt was taken directly from the IDC Competitive Analysis Report, Worldwide Job Scheduling Software 2010 Vendor Shares, by Mary Johnston Turner (Doc # 228913). All or part of the following sections are included in this excerpt: IDC Opinion, In This Study, Situation Overview, Future Outlook, Essential Guidance, and Methodology. Also included is Table 1.

## IDC OPINION

Job scheduling is a competitive submarket of the worldwide workload scheduling and automation software market as defined in *IDC's Software Taxonomy, 2010* (IDC #222023, February 2010). Job scheduling is a mature market that continues to grow slowly. Specifically:

- Worldwide revenue for the job scheduling market was $1.9 billion in 2010, representing growth of 6.2%.
- The top 3 vendors in 2010 based on worldwide revenue were Hitachi, CA Technologies, and IBM, together accounting for 52.0% of the market total.
- There will be continued growth in this market if major vendors continue to invest in modernizing products to extend them beyond core mainframe-based platforms to span a wide range of platforms, workloads, and processes.

## IN THIS STUDY

This IDC study examines the worldwide job scheduling market for the period from 2008 to 2010. Revenue and market share of the leading vendors are provided for 2010.

## Job Scheduling Software Market Definition

Job scheduling is a competitive submarket of the workload scheduling and automation software market as described in the IDC software taxonomy. IDC defines the job scheduling market as including software tools that manage the flow of workloads and applications on systems using calendar or other fixed-schedule metrics as well as event-driven triggers, such as file events or completion of jobs. This market is limited to tools that work at the application level rather than the system level. It does not include workload-balancing applications that work at the system level (e.g., high-availability software). It encompasses both mainframe and distributed platforms.

## SITUATION OVERVIEW

### The Worldwide Job Scheduling Software Market in 2010

Table 1 displays 2008–2010 worldwide revenue and 2010 growth and market share for job scheduling vendors. Hitachi continues to lead the market based on its leadership in the Japanese market. Hitachi saw real growth of about 5.8% on sales in Japan, which results in 11.8% growth reported in U.S. dollars due to currency conversion rates.

**TABLE 1**

Worldwide Job Scheduling Software Revenue by Vendor, 2008–2010 ($M)

| | 2008 | 2009 | 2010 | 2010 Share (%) | 2009–2010 Growth (%) |
|---|---|---|---|---|---|
| Hitachi | 331.6 | 361.4 | 403.9 | 21.6 | 11.8 |
| CA Technologies | 276.5 | 290.4 | 301.9 | 16.1 | 3.9 |
| IBM | 302.2 | 266.7 | 268.1 | 14.3 | 0.5 |
| NEC | 195.6 | 190.6 | 207.2 | 11.1 | 8.7 |
| BMC Software | 167.0 | 178.5 | 197.1 | 10.5 | 10.4 |
| Fujitsu | 127.5 | 148.5 | 155.2 | 8.3 | 4.5 |
| UC4 | 59.4 | 51.3 | 56.2 | 3.0 | 9.5 |
| ASG | 61.8 | 53.2 | 54.4 | 2.9 | 2.2 |
| Redwood | 29.5 | 26.8 | 28.7 | 1.5 | 7.0 |
| Nomura Research Institute Ltd. | 21.6 | 26.4 | 28.3 | 1.5 | 7.2 |
| ORSYP SA | 23.7 | 25.0 | 26.9 | 1.4 | 7.5 |
| Cisco | 32.1 | 24.7 | 26.5 | 1.4 | 7.6 |
| BSP | 17.1 | 18.7 | 19.5 | 1.0 | 4.4 |
| Advanced Systems Concepts | 6.0 | 13.5 | 15.5 | 0.8 | 15.0 |
| Beta Systems Software AG | 18.0 | 17.1 | 15.3 | 0.8 | -10.6 |
| Stonebranch | 10.0 | 10.0 | 11.0 | 0.6 | 10.0 |
| Open Systems Management Ltd. | 2.2 | 2.0 | 2.2 | 0.1 | 7.5 |
| B&L Associates | 2.0 | 1.8 | 2.0 | 0.1 | 6.4 |
| Software Eng. of America | 1.3 | 1.1 | 1.2 | 0.1 | 6.4 |
| Silicon Graphics | 0.9 | 0.9 | 1.0 | 0.1 | 5.8 |
| Subtotal | 1,686.3 | 1,708.7 | 1,821.9 | 97.4 | 6.6 |
| Other | 61.7 | 53.0 | 49.2 | 2.6 | -7.2 |
| Total | 1,748.0 | 1,761.8 | 1,871.1 | 100.0 | 6.2 |

Source: IDC, June 2011

CA Technologies and IBM continued to see growth in their installed base. Both vendors continue to invest in product upgrades and enhancements. CA Technologies, as an example, recently announced a significant, cloud-oriented update to its workload management portfolio with the launch of Workload Automation r11.3 AE (formerly known as CA AutoSys Workload Automation).

NEC and BMC Software continue to be important players. NEC growth benefited from currency conversion considerations on an estimated 2% real growth in Japan-based sales. BMC Software continues to make investments in its portfolio, including a recent cloud-oriented self-service release of the Control M Workload Automation Suite.

## FUTURE OUTLOOK

Enterprise workloads are becoming less and less predictable as application architectures change and end users gain more and more opportunities to initiate jobs on their own. IDC believes the job scheduling competitive market is on a convergence path with the distributed server/workload automation competitive market as job scheduling vendors enhance job scheduling products with cloud-oriented capabilities, such as self-service portals, and enable their products to respond to a wide range of events and triggers beyond traditional calendar-based approaches.

## ESSENTIAL GUIDANCE

IDC expects mainstream job scheduling tools will continue to be used for many years to optimize processes and workloads such as payroll processing where it is critical that jobs run at specific times. However, in more dynamic cloud environments, job scheduling, full-stack server and application provisioning, self-serve portals, complex event processing, and run-book automation and orchestration technologies are likely to merge into unified workload optimization and provisioning products over the next several years.

## METHODOLOGY

The IDC software market sizing and forecasts are presented in terms of packaged software revenue. IDC uses the term *packaged software* to distinguish commercially available software from custom software, not to imply that the software must be shrink-wrapped or otherwise provided via physical media. Packaged software is programs or codesets of any type commercially available through sale, lease, rental, or as a service. Packaged software revenue typically includes fees for initial and continued right-to-use packaged software licenses. These fees may include, as part of the license contract, access to product support and/or other services that are inseparable from the right-to-use license fee structure, or this support may be priced separately. Upgrades may be included in the continuing right of use or may be priced separately. All of these are counted by IDC as packaged software revenue.

Packaged software revenue *excludes* service revenue derived from training, consulting, and system integration that is separate (or unbundled) from the right-to-use license but does include the implicit value of software included in a service that offers software functionality by a different pricing scheme. It is the total packaged software revenue that is further allocated to markets, geographic areas, and operating environments.

The market forecast and analysis methodology incorporates information from five different but interrelated sources, as follows:

- **Reported and observed trends and financial activity.** This study incorporates reported and observed trends and financial activity in 2010 as of the end of February 2011, including reported revenue data for public companies trading on North American stock exchanges (CY 1Q10–4Q10 in nearly all cases).

- **IDC's *Software Census* interviews.** IDC interviews all significant market participants to determine product revenue, revenue demographics, pricing, and other relevant information.

- **Product briefings, press releases, and other publicly available information.** IDC's software analysts around the world meet with hundreds of software vendors each year.

- **Vendor financial statements and related filings.** Although many software vendors are privately held and choose to limit financial disclosures, information from publicly held companies provides a significant benchmark for assessing informal market estimates from private companies. IDC also builds detailed information related to private companies through in-depth analyst relationships and maintains an extensive library of financial and corporate information focused on the IT industry.

- **IDC demand-side research.** This includes interviews with business users of software solutions annually and provides a powerful fifth perspective for assessing competitive performance and market dynamics.

  Ultimately, the data presented in this study represents IDC's best estimates based on these data sources as well as reported and observed activity by vendors and further modeling of data that we believe to be true to fill in any information gaps.

  In addition, please note the following:

  - The information contained in this study was derived from the IDC Software Market Forecaster database as of May 11, 2011.

  - All numbers in this document may not be exact due to rounding.