

Sun's Bundling of Application Server Will Lift iPlanet

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By endorsing iPlanet Application Server as its platform of choice, Sun Microsystems presents a new challenge for competitors and enhances the iPlanet Application Server's market prospects.

NEWS ANALYSIS

Event

On 23 October 2001, Sun announced that it will bundle iPlanet AS with its Solaris 8 operating system (OS). Sun will provide only development licenses, however; production deployment will continue to carry costs.

Analysis

Sun's plan makes iPlanet AS its default Java 2 Enterprise Edition (J2EE) platform and challenges the ability of other J2EE platform vendors (including leaders BEA Systems and IBM) to grow in the strategically important Solaris market. BEA and IBM depend on Solaris servers as the primary hardware for volume sales of their J2EE application servers (WebLogic and WebSphere, respectively). Sun's announcement will likely increase iPlanet's share of this market by the end of 2002 at the expense of the other vendors. In response, most iPlanet competitors will likely increase their commitments to alternative platforms (i.e., Windows, HP-UX, AIX and Linux).

This long-anticipated move by Sun is less dramatic than it might have been as it bundles only the iPlanet AS development license with Solaris. Sun encourages enterprises to choose iPlanet as their strategic J2EE platform but is not willing to make the J2EE platform into a commodity by bundling its run-time execution engine with the OS. Production deployment of iPlanet AS will continue to carry a substantial price tag. Sun's cautious strategy will likely not dramatically shift the balance of power in the application server space in the short term.

The bundling announcement does mark a significant change in Sun's previously lukewarm approach to supporting iPlanet AS. Enterprises should expect a more motivated, proactive approach from the Sun sales organization although the Sun sales force will likely continue to endorse alternative application servers when doing so helps it sell more Sun hardware. Bundling alone will not give iPlanet market leadership. The other essential requirements include proven product quality, dependable vendor support, industry following and market confidence in product viability.

This announcement should not alarm users of non-iPlanet J2EE application servers: Their platforms remain viable and competitive, including on Solaris platforms. Beyond 2004, however, new releases of iPlanet AS will likely capitalize increasingly on the Solaris internal architecture and potentially on its undocumented features. Thus, iPlanet will likely become the best-integrated J2EE platform for Solaris.

Gartner has repeatedly expressed concern that the ill-defined Sun/iPlanet relationship represents a risk for iPlanet AS users and prospects. This Sun announcement removes some of the risk and so will boost iPlanet AS's market prospects, yet Sun's position remains cautious and hedged — and does not dispel all of Gartner's long-term concerns.

Analytical Sources: Yefim Natis and Massimo Pezzini, Application Integration and Middleware Strategies

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