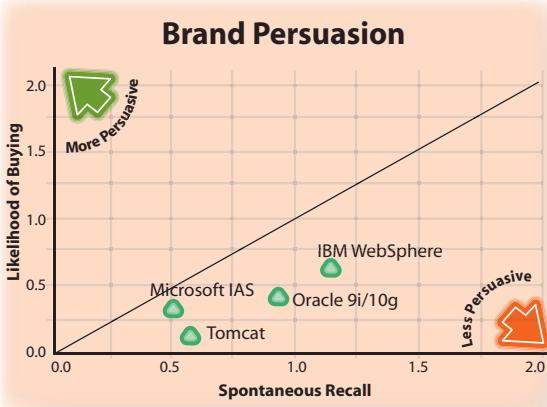
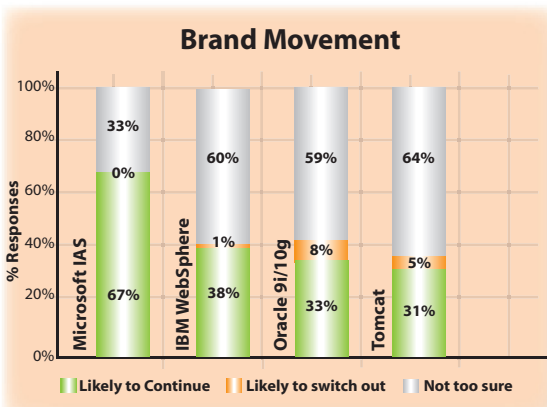
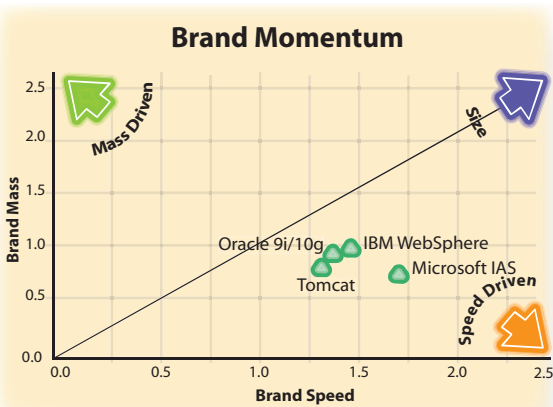


# Application Servers



Brand Momentum Index			
Brands	Relative Index	Current User Share	Expected Future User Share
IBM WebSphere	100%	19%	31%
Oracle 9i/10g	62%	14%	19%
Microsoft IAS	57%	7%	18%
Tomcat	36%	9%	11%



Microsoft IAS server stands out as the most persuasive brand in this segment, even though its cumulative ownership is only 7%, which is less than half that of the top brand IBM WebSphere. Oracle 9i/10g is also quite persuasive at number two, followed by Tomcat & IBM WebSphere. IBM enjoys the highest top of mind recall amongst 38% of the CIOs, but only 10% of them said that they're likely to buy it in the near future. That's why it stands last in brand persuasion.

Microsoft's IAS also enjoys the highest brand loyalty, which is almost double of others. About 67% of Microsoft IAS's existing users said that they're not likely to switch to another brand in the near future. The brand loyalty for all other brands hovers between 31% and 38%. However, this is not because their users want to shift to another brand. The shift is miniscule. The only shifts worth mentioning are for Oracle and Tomcat. About 8% of existing Oracle 9i/10g users said that they're likely to shift to another brand, and 5% of existing

Tomcat users said the same thing. There's negligible shift amongst IBM's enterprise users, and zero percent shift amongst Microsoft IAS's current ownership base.

Besides Microsoft, all other brands have a significant set of uncertain CIOs who are not sure about which brand are they likely to switch to. These could swing the brand loyalties to either direction. Coming to brand momentum, IBM WebSphere is the most future ready, largely due to its current mass. Moreover, it's got enough momentum in the market to help it grow its future user share to 31% from the existing 19%. That's quite a lot. Oracle has the next highest brand momentum, and at the current pace, it is likely to gain user share, but only by 5%. Microsoft IAS Server is the next in line, and although its brand momentum is around 50% of IBM, it's likely to gain user share considerably from the current 7% to more than double at 18%. The brand with the lowest brand momentum is Tomcat, but even then, it's not likely to lose user share in the future. □