

Competitive Intelligence Report

Red Hat Rolls Out Java Development Tool

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Current Perspective:

Positive

Vendor Importance:

Very High

Market Impact:

Moderate

Summary

Event Summary

December 10, 2007 -- Red Hat, a provider of open source solutions, announced the global availability of JBoss Developer Studio, an open source, Eclipse-based, integrated development environment combining tooling with runtime. JBoss Developer Studio provides a simple, powerful, and easy-to-use solution for developers utilizing JBoss Enterprise Middleware. The solution provides a stable end-to-end, lifecycle environment for application development and deployment, enabling enterprises to respond more quickly and efficiently to rapidly changing business requirements. JBoss Developer Studio is available for \$99.00.

Analytical Summary

- **Current Perspective:** Positive on Red Hat's release of JBoss Developer Studio 1.0, because this open source, Eclipse-based, integrated development environment marks Red Hat's first foray into development tooling and offers a unique solution aimed squarely at positioning the company's JBoss Enterprise Middleware favorably with developers through a combined tooling and runtime package that has been certified and tested for stability and ease of use.
- **Vendor Importance:** Very high to Red Hat, as the firm needed to make good on its pre-announcements concerning JBoss Developer Studio this March, when it formed a strategic partnership with Exadel to open source Exadel's development tools for use by Red Hat through the JBoss.org community. Despite being a few months behind schedule and not yet fully leveraging Red Hat's suite of platforms, JBoss Developer Studio fills an important void in the firm's SOA product portfolio and sets the stage for a single development and composition environment spanning that portfolio.
- **Market Impact:** Moderate on the service-oriented architecture (SOA) application infrastructure market, because for the near future, Red Hat's entry into the developer tools space comes as no surprise and does not represent an immediate threat within the broader

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vendor community, which already possesses a well-established ecosystem of Eclipse-based development, composition, governance, and management tools tied closely with server-side solutions. However, pure-play tooling providers such as CodeGear and Genuitec will find this product immediately threatening within established JBoss Middleware customers. Long term, SOA platform vendors with tooling products will feel pressure to match Red Hat's unique approach to tightly coupling tooling and runtime environments.

Current Perspective:

Positive

Target Markets

Vendor Importance:

Very High

Global 2000, IT Implementers, Large Enterprises, Resellers/Channels, Small to Medium Enterprises, Systems Integrators, Third Party Implementers

Market Impact:

Moderate

Perspective

Current Perspective: Positive

We are taking a positive stance on Red Hat's release of JBoss Developer Studio 1.0. With this release, Red Hat has filled an important void in its SOA product portfolio. This open source, Eclipse-based, integrated development environment marks Red Hat's first foray into development tooling and offers a unique solution aimed squarely at positioning the company's JBoss Enterprise Middleware favorably with developers through a combined tooling and runtime package that has been certified and tested for stability and ease of use at a flat rate of \$99 without technical support.

The release of JBoss Developer Studio builds upon a strategic relationship formed this March between Red Hat and professional services provider Exadel in which Exadel open sourced its Exadel Studio Pro and RichFaces solutions to Red Hat's JBoss.org community. Though originally expected to launch this summer, the product went into beta this August (with more than 100,000 subsequent downloads) before being made generally available this month. In this regard, Red Hat's entry into the developer tools market comes as no surprise and does not represent an immediate threat within the broader application infrastructure community, which already possesses a well-established ecosystem of Eclipse-based development, composition, governance, and management tools tied closely with server-side solutions.

Overall, Red Hat's approach with JBoss Developer Studio presents some key benefits for Red Hat customers that set the company aside from its rivals. First and foremost, Red Hat has decided to market JBoss Developer Studio not as a standalone product but as a part of a tested and certified stack that couples the IDE with the company's JBoss Enterprise Application Platform (which includes JBoss Application Server, Hibernate, and Seam) and Red Hat Enterprise Linux. In this way, the company can ensure that all interdependent development libraries and application packages are compatible. Additionally, to help developers get up to speed in developing JBoss Enterprise Middleware solutions, JBoss Developer Studio includes 70 pre-built JBoss RichFaces components, which are ready-made, AJAX-based UI elements that can be quickly skinned (customized) and graphically visualized within the development environment via a visual page editor. Similarly, facilitating workflow composition, this product also embeds JBoss jBPM to make use of its Graphical Process Designer.

The introduction of JBoss Developer Studio also presents some opportunities for Red Hat competitors. An important go-to-market message with JBoss Developer Studio is



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that it bundles all tooling and runtime elements within a single, tested package to ensure compatibility across the entire application stack. However, while the company has fully tested its own Linux distribution and Windows, it has not done so for other Linux distributions, relying instead on testing work conducted by users through its JBoss.org ecosystem. Similarly, the company has not yet delivered support for the Mac OS platform, though it has a solution in the works. In addition, the firm does not provide a single installer for all bundled solutions. Moreover, while Red Hat has positioned JBoss Developer Studio as a tool to make developers more productive with its JBoss Enterprise Application Platform, compared with its competitive set, this solution has yet to embrace use roll-driven tooling that combines application development with test and deployment as well as business process modeling and composition activities. The company has made a start by employing JBoss jBPM for process flow composition, but the product does not yet serve user roles beyond that of Java developer.

These issues aside, the introduction of JBoss Developer Studio showcases Red Hat's key strength – its ability to build innovative solutions that leverage and in so doing improve the value of the Red Hat Enterprise Linux platform. This solid foundation, upon which Red Hat has built a development environment that aims to lower time-to-market and development costs for Java developers employing JBoss Enterprise Middleware, moves Red Hat further into the competitive arena within the application infrastructure market.

Positives and Concerns

Competitive Positives

- Red Hat has filled an important void in its SOA product portfolio with the release of an open source, Eclipse-based, integrated development environment, JBoss Developer Studio. Built using technology derived from a partnership with Exadel, Red Hat's first foray into development tooling offers a unique solution aimed squarely at positioning the company's JBoss Enterprise Middleware favorably with developers through a combined tooling and runtime package that has been certified and tested for stability and ease-of-use at a flat rate of \$99 without technical support.
- Building on its recent work to create a fully tested application stack that includes operating system, application server, and supporting services, Red Hat has decided to market JBoss Developer Studio not as a standalone product but as a part of a tested and certified stack that couples the IDE with the company's JBoss Enterprise Application Platform (which includes JBoss Application Server, Hibernate, and Seam) and Red Hat Enterprise Linux. Windows is supported as well. In this way, the company can ensure that all interdependent development libraries and application packages are compatible.
- Also in an effort to help developers improve productivity within a Red Hat application environment, the company has built a single installer for most JBoss Developer Studio components (including application server and all Eclipse-based tools). The operating system, however, must be installed separately through the Red Hat Network. Red Hat has also included developer access to its Red Hat Network service, through which customers can gather package updates that have been tested and certified for compatibility. Similarly, Red Hat has pledged to support the JBoss Enterprise Application Platform software for five years after purchase.
- Although Red Hat's JBoss Developer Studio is a 1.0 release, it is anything but a first stab

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or untested solution. Through a partnership, which was formed in March of this year, with professional services provider Exadel, Red Hat has built its development solution utilizing Exadel's already-established Studio Pro and RichFaces/Ajax4jsf component libraries, all of which the company contributed to Red Hat's JBoss.org community earlier this year. Since being released in beta this August, Red Hat has seen 100,000 downloads, making this product a well-tested 1.0 release.

- To help developers get up to speed in developing JBoss Enterprise Middleware solutions, JBoss Developer Studio includes 70 pre-built JBoss RichFaces components, which are ready-made, AJAX-based UI elements that can be quickly skinned (customized) and graphically visualized within the development environment via a visual page editor. Similarly, facilitating workflow composition, this product also embeds JBoss jBPM to make use of its Graphical Process Designer.

- With Red Hat's recently released Red Hat Enterprise Linux 5, which includes a Xen-based hypervisor solution for server virtualization, JBoss Developer Studio users can simplify and streamline application testing across multiple operating systems. Though this product cannot deploy applications directly to this hypervisor, it will let developers quickly establish disparate environments without having to provision actual hardware. Developers can even set up simple deployment and development environments on the same machine for demonstration or proof-of-concept work.

Competitive Concerns

- An important go-to-market message with JBoss Developer Studio is that it bundles all tooling and runtime elements within a single, tested package to ensure compatibility across the entire application stack. However, while the company has fully tested its own Linux distribution and Windows, it has not done so for other Linux distributions, relying instead on testing work conducted by users through its JBoss.org ecosystem. Similarly, the company has not yet delivered support for the Mac OS platform, though it has a solution in the works. In addition, the firm does not provide a single installer for all bundled solutions.

- Red Hat has positioned JBoss Developer Studio as a tool to make developers more productive with its JBoss Enterprise Application Platform. However, compared with its competitive set, this solution has yet to embrace roll-driven tooling that combines application development with test and deployment as well as business process modeling and composition activities. The company has made a start by employing JBoss jBPM for process flow composition, but the product does not yet serve user roles beyond that of Java developer.

- Along a similar vein, JBoss Developer Studio does not yet serve as a unified Java development environment for the vendor's growing range of SOA solutions. For example, it is not yet bundled with or able to support the company's JBoss Enterprise Portal Platform or MetaMatrix Enterprise Data Services Platform. Note that Red Hat intends to expand the product to support these and the forthcoming SOA platform, though it has not specified a timeframe for doing so.

- While JBoss Developer Studio is an open source solution (released under GPL V2), it does impose a price tag, though a modest one at only \$99. Customers interested in product support will have two very disparately priced options, a single-developer support contract for 3,500 annually or an enterprise contract for more than one developer starting at 30,000 per year. This may constrain smaller organizations that need support for more than one developer. That said, organizations requiring support SLAs will find the price tag acceptable and appropriate.



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• Red Hat intends to pursue an aggressive product update cycle with JBoss Developer Studio to keep pace with developer requests for newly introduced technologies. However, because it is tied closely to a number of Red Hat frameworks and products for testing and certification, customers will often need to wait for all interdependent products to support a given technology. This is the case with Seam. Version 2.0 is in production but not yet certified and tested for release within a Red Hat Platform. Therefore, because JBoss Application Server currently supports version 1.2, JBoss Developer Studio must stick with version 1.2 as well.

Recommended Actions

Recommended Vendor Actions

- By bundling Red Hat Enterprise Linux 5 with JBoss Developer Studio, Red Hat will enable customers to take advantage of that operating system's recently introduced virtualization capabilities – something of critical importance to developers looking for a cost-efficient means for conducting application testing and modeling. However, to truly differentiate itself from other vendors with hypervisor solutions, Red Hat should consider modifying its application server and development tooling to allow programmers to deploy code right into Red Hat Enterprise Linux 5's hypervisor.
- Red Hat should expand its test and certification program to include Linux distributions outside its own Red Hat Enterprise Linux offering. While user testing will reveal many incompatibilities, because Red Hat's go-to-market approach with JBoss Developer Studio is to provide a fully tested application stack that includes the operating system, conducting such tests in-house or partnering with operating system vendors such as Novell with SUSE will create a stronger sense of trust with customers.
- Though Red Hat has specified that it is only interested in making Java developers more productive on its JBoss Enterprise Middleware offerings, the company should strongly consider widening its scope of interest and concern to include business analysts and IT test/deployment/management specialists. Most rival vendors have already embraced the notion of a single, role-based development environment built on Eclipse.
- Regarding support options, Red Hat should consider filling the space between its \$3,500 dollar yearly subscription price point for one developer and its \$30,000 dollar (starting price) yearly subscription for more than one developer. While a small group of developers can assign a single individual as the point of contact for all support issues, larger organizations looking to employ open source as a cost-cutting measure but not requiring aggressive SLAs may find this large jump daunting.
- Red Hat should revise its go-to-market materials for JBoss Developer Studio to place emphasis on the product's ability to facilitate Web 2.0 application development through bundled support for Seam as well as 70 pre-built JBoss RichFaces components, which are ready-made, AJAX-based UI elements that can be quickly skinned (customized) and graphically visualized within the development environment via a visual page editor. These out-of-the-box tools will allow Red Hat to position this solution directly opposite mainstream development tools that focus on deploying Web 2.0 applications (wikis, blogs, etc.) rather than custom development.
- In order to compete with traditional SOA platform vendors such as BEA, TIBCO, IBM, Oracle, and others, Red Hat should move quickly to position JBoss Developer Studio as

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its central, universal development and composition interface in support of its JBoss jBPM, JBoss Enterprise Portal Platform, and MetaMatrix Enterprise Data Services Platform solutions.

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Recommended Competitor Actions

- IBM, TIBCO, BEA, Sun, Microsoft, and Progress should position Red Hat’s offering as comparatively immature next to their well-established SOA-savvy development IDEs that combine component visualization, pre-built UI widgets, rich Internet application (RIA) technologies such as AJAX, role-based user access, and support for team development as well as a broad spectrum of languages (interpreted and scripting) and development frameworks.

- IBM (with Novell), Oracle, and Sun should pay close attention to Red Hat’s growing emphasis on certified application stacks that leverage the company’s operating system. By providing a “locked down” stack in which all interdependent applications and supporting frameworks and libraries are tested and found to be fully interoperable, these vendors can significantly lower administration costs and quicken time to market. When Red Hat expands this concept across a number of specific horizontal solutions (such as portal and ESB), this approach will prove threatening to the competition.

- All rivals, but especially pure-play development tool vendors such as CodeGear and Genuitec, should position Red Hat’s claim of delivering the only open source, eclipse-based solution as an assertion that may be wholly true but without sizable impact with enterprise customers, which are not building software for redistribution. Pure-play rivals should also point out that Red Hat’s certified and bundled software stack (e.g., development tool, operating system, application server) encourages vendor lock-in.

- Rival SOA platform vendors should position Red Hat’s release of JBoss Developer Studio as a solid first release focusing solely on Java application developers that are employing Red Hat’s application server. As such, it is limited in scope in terms of its support of broader SOA initiatives in which business process architects or other users employing application and process modeling skills must collaborate.

- Competitors without hosted management solutions should consider building hosted services in support of monitoring, provisioning, patch management, governance, and perhaps even performance management and compliance monitoring tools. Red Hat already possesses a number of hosted tools, focused on the operating system, which the company intends to broaden across its entire product base (moving aggressively into its JBoss SOA solutions) to support capabilities listed above.

Recommended End User / Customer Actions

- Current Red Hat customers considering the JBoss Developer Studio should welcome this software, which promises to streamline and facilitate development within a Red Hat environment. However, these customers should carefully investigate the adoption of this product, as it will necessitate the adoption of the company’s certified and tested stack, which may carry unwanted framework/application version changes.

- Potential customers with experience in developing Java-based applications using open source, should strongly consider Red Hat’s JBoss Developer Studio, as this solution provides a thoroughly tested suite of applications and development frameworks that can cut initial

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deployment times considerably and ease management costs over the long haul, owing to Red Hat's ability to roll out new technologies without creating potential incompatibilities within customer installations.

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- Potential customers should note that while JBoss Developer Studio provides a completely tested and certified software stack, customers can still install untested development libraries, as Red Hat will not cripple the software to only run supported code. That said, customers experiencing problems with unsupported code will not be able to receive support for problems stemming from that code.

- Potential customers concerned about the frequency with which Red Hat will update JBoss Developer Studio, given the fact that the company must test it and all bundled software for compatibility, should note that the company intends to pursue a more aggressive release cycle with this product compared with other Red Hat solutions (which are not updated on a quarterly basis). It is important to note, however, that because of interdependencies with bundled software, JBoss Developer Studio may not be the first product on the market to support an emerging technology or standard (as with Seam 2.0).

