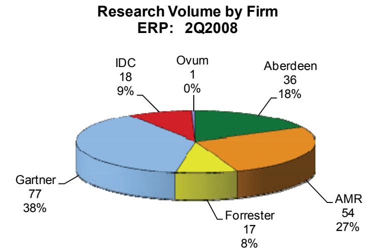
ERP

2Q2008

Charts reflect both firm-level and report-level weighting

Publication volume has stayed remarkably constant for the ERP market over the last four quarters, averaging about 200 reports per period.

Gartner regularly accounts for about one-third of all reports related to the ERP market, followed by AMR and Aberdeen with about 25% and 18% share, respectively. IDC consistently accounts for about 10% of the reports. Publication volume from Forrester and Ovum fluctuates significantly quarter-to-quarter.



For Share-of-Voice (SOV), SAP and Oracle are clearly the market leaders, followed by Microsoft. Notably, SAP's lead for SOV has been steadily declining over the last year. In the most recent quarter, Oracle trails SAP by only 1.3%. In contrast, Microsoft's SOV has declined over the last two quarters, with Microsoft now capturing 15% less coverage than Oracle.

When coverage tonality is considered, SAP emerges as the solitary leader. SAP has proven more effective at translating its coverage into positive Net Market Impact (NMI) and leads Oracle in the most recent quarter by 13%. Oracle's NMI has remained constant for the past five quarters.

From an NMI perspective, Microsoft receives near-equal impact as Infor, NetSuite, and Sage – all much smaller organizations. Microsoft must do more to capture the positive attention of the analyst community. During 2Q2008 SAP received feature coverage in over 120 reports, Oracle received feature coverage in almost 90 reports, whereas Microsoft received feature coverage in only 35 reports.