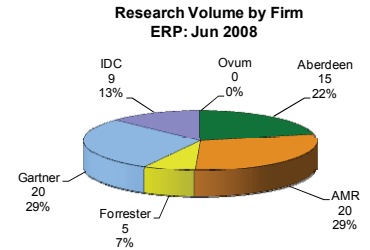


Charts reflect both firm-level and report-level weighting

Publication volume for the ERP market is steady, with an average of 67 reports over each of the last six months. Further, publication volume is steady from each of the major analyst firms, with both Gartner and AMR regularly accounting for about 30% each of the publication volume, followed by Aberdeen, IDC and Forrester with 20%, 10%, and 10% of the volume, respectively. Ovum publishes reports for the ERP market only on a sporadic basis.



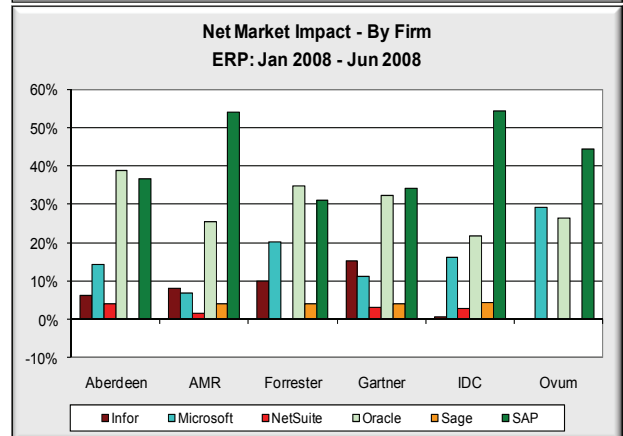
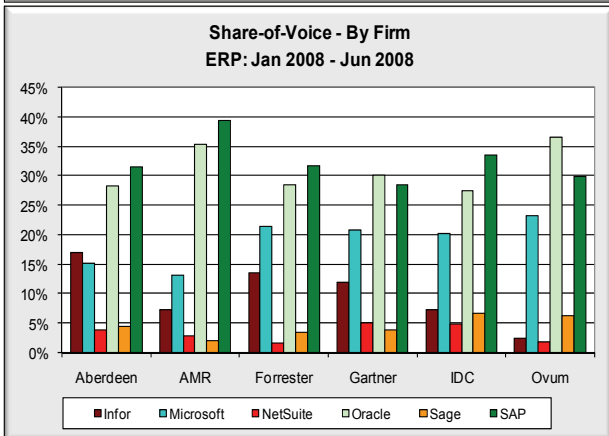
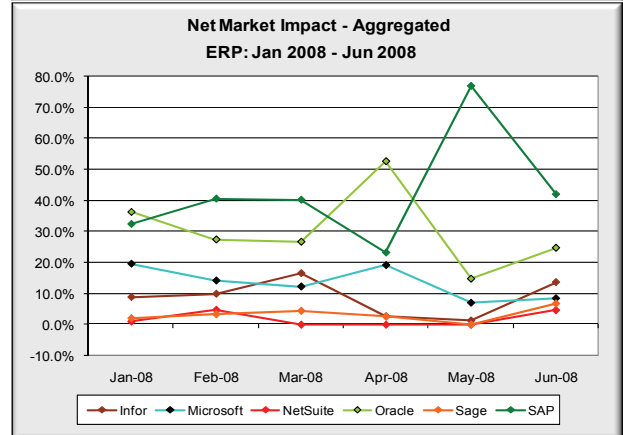
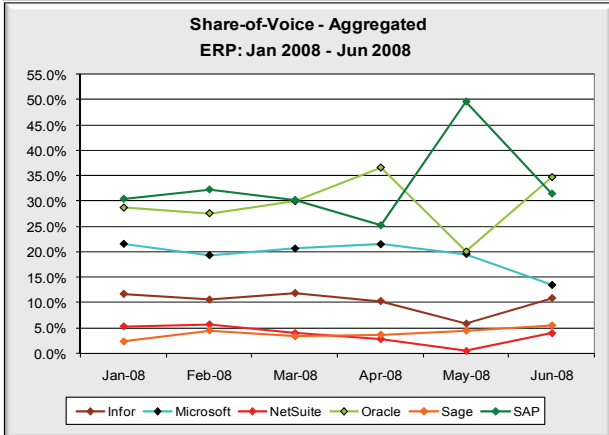
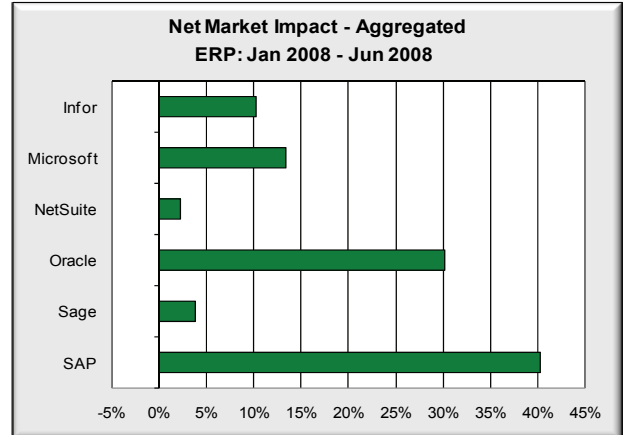
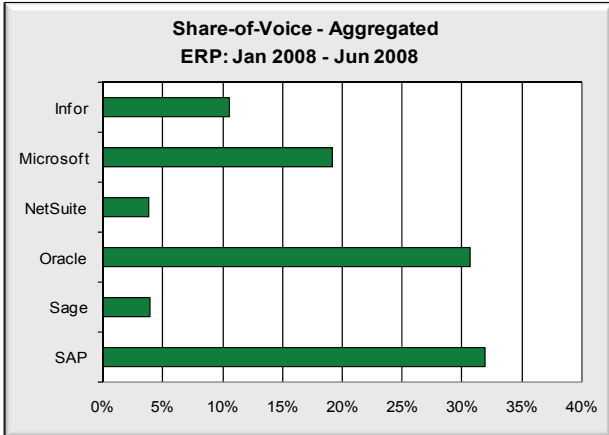
Over the past six months, SAP and Oracle have received near-equal Share-of-Voice (SOV). However in Apr, Oracle received additional coverage following the Oracle OpenWorld event. In May, SAP received an even stronger boost in coverage following its SAPPHERE event.

Overall, SAP has proved more effective at translating coverage into positive impact and was better able to sustain their post-event positive impact. Over the past six months, SAP leads Oracle by over 10% for Net Market Impact (NMI).

Microsoft holds the #3 position for both SOV and NMI. How-

ever, Microsoft has suffered from some negative coverage from both Gartner and IDC, resulting in Microsoft receiving only 13% NMI on a SOV rating of over 19%.

For the current month, SAP's strong NMI was driven by very positive coverage in AMR's HCM market sizing report, a Forrester report on ERP applications going vertical, Gartner's ERP software market share reports, and an IDC update on enterprise retail suits. Oracle receive several positive references, but only received very positive coverage from AMR related to its Q4 results.



Analyst Publications - Jun 2008

Firm/Report	Infor	MS	NetSuite	Oracle	Sage	SAP
Aberdeen						
Reva Systems and Oracle Join Forces to Extend RFID's Business Value	-	-	-	Neu	-	-
OATSystems: Extending RFID's Business Value with Oracle, SAP Integration	-	-	-	Neu	-	Neu
Will 2008 Finally be the Year of Plant-to-Enterprise Integration?	-	Neu	-	-	-	-
Are the Barriers to SaaS ERP Breaking Down?	-	-	Pos	-	-	Pos
Europe Outperforms North America in Employee Performance Management	-	-	-	-	-	-
Integrating PLM & ERP: It's not just a one way street	Neu	-	-	Neu	-	Neu
Oracle Issues New Release for Retailers: Key Improvements for Retail Integration and Workflow	-	Neu	-	Pos	-	Pos
Solution Landscape for Closed Loop Inventory Management	Pos	-	-	Pos	-	Pos
Working Capital Optimization: Benchmarking Best-in-Class Supply Chain and Finance Strategies	-	-	-	Neu	-	Neu
E-Invoicing Meets Workflow	-	-	-	-	-	-
A/P: Imaging and Workflow in Large Enterprises	Neu	Neu	-	Neu	Neu	Neu
Lights, Camera, Action: Zycus Takes the Sourcing Stage	-	-	-	-	-	-
Total Compensation Management: European Companies Are Not Quite There Yet	-	-	-	-	-	-
Enterprise Asset Management: Maximizing Return on Assets and Emerging Trends	Neu	-	-	-	-	-
The 2008 ERP in Manufacturing Benchmark Report	Neu	-	-	-	-	Neu
AMR						
Picking the Right Business Process Tools for SAP	-	-	-	-	-	Pos
Wyeth Focuses on an Integrated View of Operations With SAP MII	-	-	-	-	-	Pos
Oracle Peer Forum Summit Session: Experiences With E-Business Suite R12	-	-	-	Neu	-	-
Five Opportunities for Success for 3PL Providers Working in Consumer Products	-	-	-	-	-	-
Industrial Value Chains: Cool Technologies To Consider	Neu	Neu	-	Neu	-	Neu
A&D Manufacturers Share Application Technology Practices	-	Neu	-	-	-	Pos
How Well Does Your Company Take Orders?	-	-	-	-	-	-
Can NetSuite Surge While SAP Decelerates?	-	-	Pos	Neu	-	Neg
SAP Nabs Visiprise To Finally Become an MES Vendor	-	-	-	-	-	Pos
JDA Software Ups the Ante on Transportation at FOCUS 2008	-	Neu	-	Neu	-	Neu
Manufacturing Peer Forum Summit Session: Next-Generation Manufacturing Strategies	-	-	-	-	-	-
Oracle E-Business Suite Peer Forum Summit Session: Update From Oracle on Status and Plans for Oracle SCM	-	-	-	Neu	-	-
Can RedPrairie Create an Alternative SOA Landscape to ERP?	Neu	Neu	-	Neu	-	Neu
New Kid on the Service Parts Block: Synchron Enters the North American Market	Neu	-	-	Neu	-	Neu
The Human Capital Management Market Sizing Report, 2007-2012	Neu	Pos	-	Pos	Pos	V Pos
Exchanging Ideas and Experiences: Logistics Outsourcing and the Value Chain	-	-	-	-	-	-
Oracle E-Business Suite Peer Forum Teleconference: Business Intelligence and Performance Management	-	-	-	Neu	-	-
Recession? What Recession? Oracle Posts Blowout Fourth Quarter	-	-	Neu	V Pos	-	-
Retail Notes for July 2008	-	-	-	Pos	-	-
Successful Lifecycle Pricing Begins With Connected Business Processes	-	-	-	-	-	-
Forrester						
The Forrester Wave™: AP-EIPP, Q2 2008	Neu	Neu	-	Pos	-	Neu
Project Portfolio Management (PPM) For Product Development	-	-	-	Pos	-	Pos
ERP Applications 2008: The Battle Goes Vertical	Pos	Pos	Neu	Pos	Pos	V Pos
Topic Overview: ERP Applications 2008	Neu	Neu	-	Neu	-	Neu
Oracle List Prices Shift: Don't Panic	-	-	-	Mix	-	Neu
Gartner						
Dataquest Insight: Midsize ERP Provider Agresso Making New Waves in North America	-	Neu	-	Neu	-	Neu
Report Highlight for Dataquest Insight: Midsize ERP Provider Agresso Making New Waves in North America	-	-	-	-	-	-
User Survey Analysis: Software Application Market Details, Budget, Worldwide, 2007-2008	-	Pos	-	-	-	-
Testing Times for HR Systems and EU Data Protection Law	-	-	-	Neu	-	Neu
Report Highlight for User Survey Analysis: Software Application Market Details, Budget, Worldwide, 2007-2008	-	-	-	-	-	-
Magic Quadrant for E-Recruitment Software	-	Neu	-	Mix	-	Mix
Cloud Computing and HR	-	-	-	Neu	-	Neu
CHEP Acquires LeanLogistics	-	-	-	-	-	-
Survey Finds Growing Use of Open-Source Software for Mission-Critical Applications	-	-	-	-	-	-
SAP Builds on Its SOA ERP Strategy at Sapphire	-	-	-	-	-	Pos

continued on next page

Analyst Publications - Jun 2008 (cont)

Firm/Report	Infor	MS	NetSuite	Oracle	Sage	SAP
Gartner						
Visiprise Buy Will Assist SAP in Assembling 'Perfect Plant'	-	-	-	-	-	Pos
Gartner's 2008 Guide to Options for Upgrading Oracle Applications	-	-	-	Mix	-	-
A Guide to Oracle Research for Application Leaders, 1Q08	-	Neu	-	Neu	-	-
Ten Components of Effective ERP Governance	-	-	-	-	-	-
Market Share: ERP Software, Worldwide, 2007	V Pos	Pos	-	Pos	Pos	V Pos
Market Share: ERP Software, EMEA, 2007	Pos	Pos	Pos	Pos	Neu	Pos
Market Share: ERP Software, North America, 2007	V Pos	Neu	Neu	Mix	Pos	V Pos
MarketScope for Sales and Operations Planning	-	Neu	-	Pos	-	Pos
IDC						
NetSuite Moves Deeper into the Services Vertical, Announces Plans to Acquire OpenAir	-	-	Pos	Neu	-	-
Noteworthy Announcements in Manufacturing Technology — May 12–25, 2008	-	Neu	-	Neu	-	Neu
SAPPHIRE 2008: Is No News Good News?	-	-	-	Neu	-	Mix
Modernizing Your Supply Chain: The Execution Imperative	Neu	Neu	-	Neu	-	Neu
SMBs in the Spotlight at SAPPHIRE 2008	-	-	-	Neu	-	Pos
An Update on Enterprise Retail Suites: Bravo SAP	-	-	-	Pos	-	V Pos
Facing the Economic Slowdown: The Top 5 Retail IT Initiatives That Must Survive Budget Belt-Tightening	-	-	-	-	-	-
Overhauling the Backhaul to Offset Rising Fuel Costs: Transportation Applications That Support Continuous Moves	-	-	-	Neu	-	Neu
DemandTec's Drive For Demand Intelligence Dominance: Now With Assortment and Loyalty Offerings for FMCG	-	-	-	Neu	-	Neu

Firm-Level Weighting

Aberdeen	0.4	Gartner	1.0
AMR	0.8	IDC	0.6
Forrester	0.8	Ovum	0.6

Report-Level Weighting

Signature Research	1.0	Market Profile	0.8	News Commentary	0.2
Vendor Profile/Rating	0.8	Operational Guidance	0.6	Blog Entries	0.2
Market Commentary	0.8	General Research	0.5		