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**Oracle at 30**

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# Agenda

- Oracle is 30 years old – some of the milestones
- Oracle in 2008
- The pace of acquisitions is maintained
- Expansion in South-East Europe
- Expectations for 2008



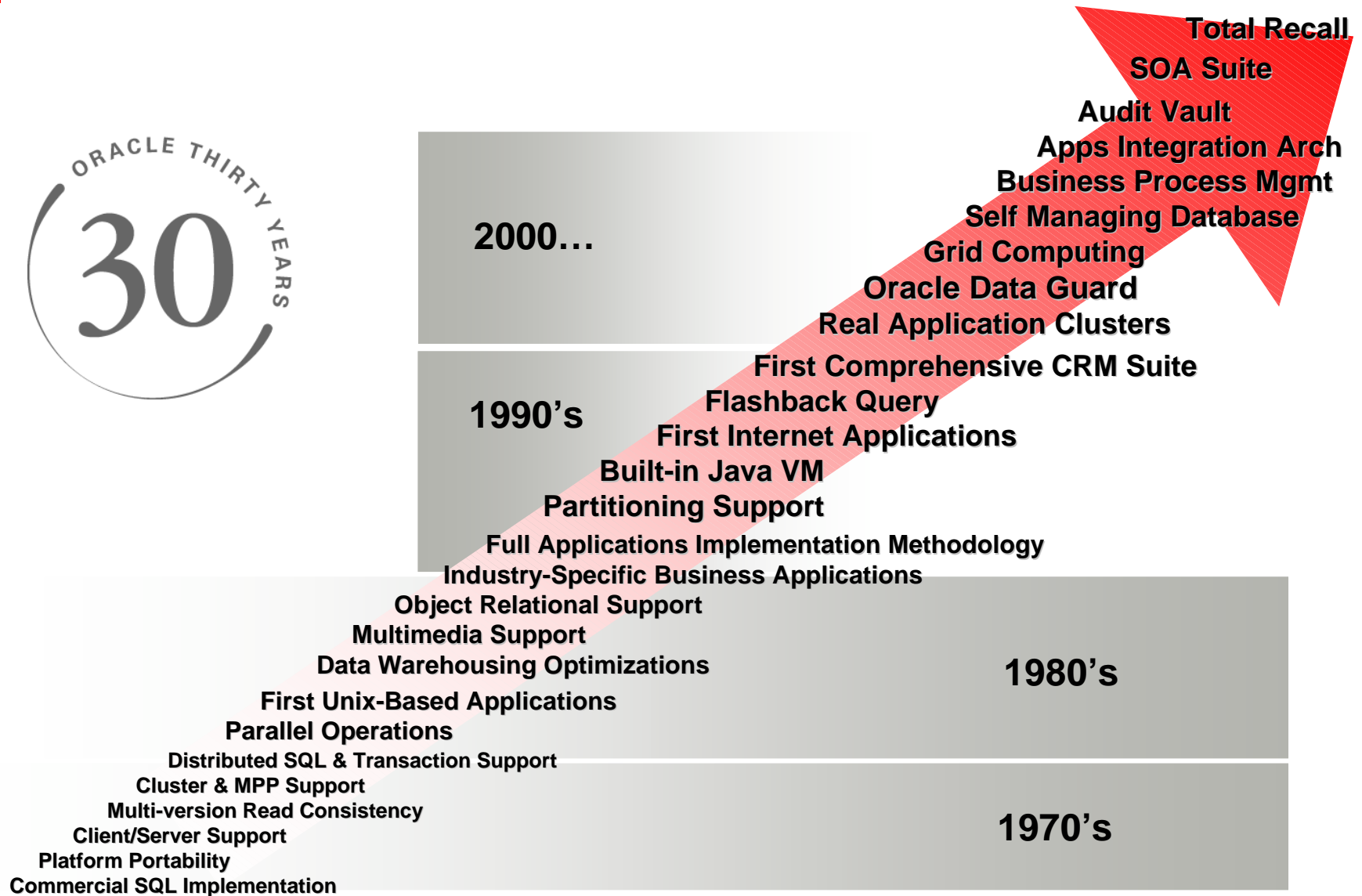
# Oracle's Key Differentiators



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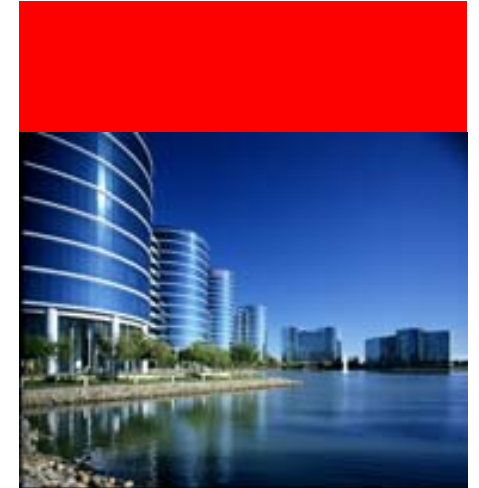
- Foresight
- Constant innovation
- Effective execution

# 30 Years of Continuous Innovation



# Oracle Corporation

- World's largest enterprise software vendor
- 275,000 global customers
- 30,000 applications customers
- 190,000 small business customers
- 68,000 employees; 7,500 support personnel
- 19,000 partners
- 9,000 Independent Software Vendors (ISVs)
- Operating in 145 Countries





## Oracle in FY07

- Revenues were up 25% to \$18 billion
- Software revenues for the year were up 23% to \$14.2 billion
  - Database and middleware new license revenues were up 16% and applications new license revenues up 32%.
  - Gartner's just published database research report confirms that Oracle's database market share has now increased to 47% while IBM's share declined to 21%
  - Over the last twelve months Oracle's application new software license revenues grew at a rate of 32% while SAP's growth slowed to 10% in their most recent fiscal year
- Services revenues were up 33% from a year ago
- In EMEA,
  - Revenues in EMEA increased from \$4.7 billion to \$6.0 billion
  - Applications up 33%; total software up 15%
  - Staff increased from 13,812 to 15,680



# And into FY08

- Q1
  - Record first quarter - revenues up 26% to \$4.5 billion
  - New software licences revenues up 35%
  - Highest growth rate for over 10 years
  - DB and MW growth rate at 23% was highest in 7 years
  - Closing in on IBM for market leadership in MW
  - Applications grew 65% (SAP's most recent growth was 18%)
- Q2
  - Second quarter revenues up 28% to \$5.3 billion
  - New software sales up 38% to \$1.7 billion
  - DB and MW up 28%
  - Applications up 63%



# Oracle Acquisitions in 2007 and 2008

- **Agile**
  - The combination of Oracle and Agile a best-in-class, integrated enterprise-wide PLM solution.
- **AppForge**
  - Extends Oracle's mobile applications product strategy.
- **Bharosa**
  - The next generation of adaptive, risk-based access management.
- **Bridgestream**
  - Extends Oracle's Identity Management Suite with automated enterprise role management.
- **Hyperion**
  - The most complete, integrated end-to-end enterprise performance management system
- **Interlace**
  - Operational planning, widening EPM offering
- **LODESTAR**
  - Extends its Oracle Utilities applications suite with the addition of leading meter data management and energy operation solutions.
- **Netsure Telecom Limited**
  - Extends the Oracle Communications application product suite to include business intelligence and analytics for the network domain.



# Oracle Acquisitions in 2007 and 2008

- **Tangosol**
  - The first integrated platform that enables extreme transaction processing.
- **LogicalApps**
  - leading provider of automated Governance, Risk, and Compliance (GRC) controls for enterprise applications.
- **Moniforce**
  - a pioneer in real end-user monitoring with customers across key industries including financial, retail and government
- **Captovation**
  - a leading provider of document capture solutions that streamline the process of capturing mission-critical content for access from within business applications and processes
- **BEA?**



## Database

- Database
- Real Application Clusters
- Partitioning
- OLAP and Data Mining
- Security
- Spatial
- Oracle Lite
- Times Ten

## Middleware

- Application Server
- SOA / Integration
- Business Intelligence
- Content Management
- Identity Management
- Data Hubs
- Collaboration Services
- Java Development Tools
- Enterprise Performance Management

## Applications

- E-Business Suite
- PeopleSoft Enterprise
- Siebel
- JD Edwards
- Oracle Retail
- i-Flex
- Communications Billing
- Utilities
- ProfitLogic
- G-Log



## Oracle in South-East Europe

- Now includes Greece and Romania to increase our pool of expert resources
- Every country would like to have it's own expert resources but this cannot be the case in our rapidly expanding and ever diversifying markets.
- All of our technical staff are specialising to help their home country .... and every other one in SEE and beyond.
- But our commitment is when you want to speak to Oracle there will be someone in Oracle in your country who will advise you or undertake to solve your problem.



# Oracle resources to help you

- The starting place is the local Sales and Sales Consulting resources
- Specialist SEE-wide sales resources to advise you about the most appropriate solution in :
  - CRM, EPM and Business Intelligence
  - Security and Identity Management; Grid Computing
  - SMB and Partner Management
- Specialist SEE-wide technical resources
  - Enterprise Content Management; SOA
  - System Configuration and Sizing;
- Specialist regional resources
  - By industry: Comms and Media; Healthcare
  - For partners: ISV migration centre in Istanbul



## Incubator programme for new technologies

- Our challenge is to launch our new technologies in as many countries as there is demand as quickly as possible,
- Incubator management team to develop plans and marshal resources to accelerate their introduction
- International teams formed to create early adopters and reference customers



# Successes in SEE in FY07

- Overall software revenues grew 16%
  - We did a great job in Middleware which grew at 37%
  - And Applications at 20%
- Star countries
  - Bosnia growing at 370%
  - Serbia growing at 57%
  - MAK growing at 47%
  - Slovenia recovered well and grew at 20% with outstanding growth in Middleware
- And in FY08
  - Growth of 20% expected again



# Challenge for this year

- Foresight, constant innovation, effective execution
- Assess where our leading-edge technology and business applications solutions can add value to your organisations
  - Ensure that you understand our solutions
  - We will help you assess their impact
- Our challenge is, in conjunction with our partners, to work with our customers to quickly implement effective, leading-edge technology and business application solutions to build competitive advantage



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**Thank you**

