Chapter 15
Case Study:
SOA Implementation Challenges for Medium Sized Corporations

Brenton Worley
Intunity Pty Ltd., Australia

Greg Adamson
University of Melbourne, Australia

ABSTRACT

In the commercial world, SOA implementation practitioners are finding a gulf between tools, whether vendor-based or open source, and the practical first needs of customers. Future-facing tool developers are addressing problems of orchestration to achieve the SOA promise. Most corporations, however, have not yet established either the services to be abstracted, or the governance requirements around exposing those services, such as the right level of service granularity. This case study is based on recent experience in the utility and retail sectors. The drivers for each are compelling: a business-driven need for IT flexibility. Examples are provided to show that customers in both sectors need to develop their architecture and governance before attempting to choose the right tools. Confusion also exists between tools and off-the-shelf solutions in the SOA environment. The challenge of agile approach for SOA development is also examined.

INTRODUCTION

The Service Oriented Architecture (SOA) approach to information technology implementation provides the means of simplifying future IT implementation. In order to reach that goal, however, enterprises must introduce significant changes into their approach to IT. A typical SOA engagement begins with a focus on the potential that could be achieved, and then quickly encounters practical limitations that have to be addressed. One of the challenges is in establishing the necessary architecture and governance within an organisation. This case study examines how this varies from the more ambitious, higher level focus of many SOA projects, looking to build solutions to future
problems, while the most basic problem of building services is still work in progress. This research examined this challenge through the experience of a SOA industry implementation practitioner, Brenton Worley. For the past five years he has worked with SOA implementations primarily in the utilities and retail industries, and is interviewed by Dr Greg Adamson, co-Editor-in-Chief of the *International Journal of Web Portals*.

**Q:** What industries have you worked with in relation to Service Oriented Architecture, and what were their drivers?

I have worked with Service Oriented Architecture projects in two industrial sectors, utilities and retail, here in Australia. This includes projects that I have been directly involved in, and others things that my company has been involved in that I have directed. My earliest SOA work was with utilities. This was for ‘market contestability’ in the electricity and gas industries. Market contestability involved splitting utility infrastructure, the network distribution business, from retail customer businesses. Customers then had a choice of which retail company they bought their gas or electricity from. Under market contestability a lot of companies were split this way.

These companies had internal technology systems. Suddenly they were split into separate businesses that had to communicate with each other. It brought business-to-business [B2B] communication to the forefront. The industry processes now spanned multiple businesses that had to communicate between separate companies. I worked with both utility retail businesses and network distribution businesses. They were concerned with protecting their internal systems, decoupling their internal systems from the market changes. These internal systems now had to respond to changes requested not only by the new separate companies, but also from market regulators. These requests were effectively beyond their control, but they had to abide by them. I worked on a number of SOA projects in this sector. These ranged from strategy work to why SOA and business process management [BPM] were needed. At that time SOA was already being tied into business process management.

In 2004 we did strategy work with what was then a joint network distribution and retail business. At the time they were ring-fenced [ie operated independent systems to reflect their individual roles in the market]. Later they separated, and I worked for the network distribution business implementing the strategy we had previously developed within the original company. This company’s main driver was the need to decouple their internal systems from external demands for change. The retail business was after some agility and flexibility but that wasn’t a driver for the network distribution business, which worked on very long timeframes in a regulated profit-margin business. As a result there were no real drivers for the network distribution business to be agile, to cut their costs dramatically. Instead it was around protecting systems and risk mitigation. There were a lot of B2B components and long-running industry processes that spanned multiple businesses and trading partners. There were other utility companies involved, alongside market operators that managed data and acted as go-betweens. Initially I worked independently, then we started up Intunity and we were involved in project inception.

For these projects there were two parts: the strategy side for the original company, and then implementation of the SOA architecture for a national B2B project at one of the network distribution businesses. Market contestability had put in place a lot of processes and B2B transactions around transferring customers. But it hadn’t put in place many of the service transactions that were required once that customer had transferred from the main retailer which was tied closely to the network operator to a third party one. How would they service a customer when you rang up and disagreed with a meter reading, or wanted to get
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