

WINTERGREEN RESEARCH, INC.

**Mid Market (SMB) Application Integration Market
Opportunities, Strategies, and Forecasts, 2003 to 2008**

Mid Market (SMB) Application Integration



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

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REPORT # SH29821302

458 PAGES

124 TABLES AND FIGURES

2003

\$2,800

CHECK OUT THESE KEY TOPICS

MID MARKET EAI SMB MARKET SHARES

MID MARKET EAI SMB FORECASTS

MID MARKET APPLICATION INTEGRATION EAI SMB INDUSTRY

Emerging Growth Opportunities

Guaranteed Service Levels

Advanced E-Business Infrastructure

XML STANDARDS

SMB EAI LINKING INTERNAL OPERATIONS

INFORMATION OVERLOAD AND DECISION LATENCY

MID MARKET EAI COMPANY POSITIONING

RELIABLE MESSAGING

LIFECYCLE OF SMB EAI INTEGRATION:

DESIGN, DEPLOYMENT, AND MANAGEMENT

INTERNET AS A MARKET FORCE IN MID MARKET EAI SMB

INTERNET MARKET DRIVING FORCES

EMBEDDED SYSTEMS

OPPORTUNITY ABOUNDS

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Mid Market (SMB) Application Integration Market Opportunities, Strategies, and Forecasts, 2003 to 2008

The mid market application integration (EAI) (SMB) industry depends on Internet application information exchange. There has been a rapid growth of business and consumer network use. File sharing, e-commerce, interactive television, video conferencing, and telecommuting, wireless communications, and a large increase in web content are basic system uses. Growth has resulted in levels of communications traffic that push the need for application integration out to departments and business partners of the large enterprise

Mid market application integration (EAI) (SMB) systems are located at the edge of the network and provide partner and departmental connectivity through the communications backbone network to enterprise IT departments. Mid market EAI is geared to manage large volumes of different types of voice, Internet, data, video, conferencing, and audio services as these media are exchanged between applications and travel from the edge of the network to enterprise partners.

Mid market application integration (EAI) (SMB) permits co-location of a group of distributed systems at departments and partners that connect to a central IT department. Deployment of services to distributed locations is from nodes on the network. Mid market EAI is evolving, giving a presence in every partner distributed node.

Continued growth in the mid market application integration EAI is highly dependent on a vibrant economy. A strong level of capital expenditures for infrastructure depends on demand for solutions. EAI products are responsive to consumer confidence in a fundamental way.

Growth opportunities exist in small and mid size company markets that have remained underserved because companies believed them to be uneconomical. Technology integration, density, performance, quality of service (QoS), redundancy, and adapter ease of use have been improved and optimized. The demand for improved productivity is high.

Typically the mid market looks for multi-service packages that support high-speed data services for fast intranet, extranet, and Internet communications. Broadband business-to-business collaboration and Web hosting services enhance SME business capabilities. EAI infrastructure needs to leverage these aspects of doing business that are enabled by the Internet. Mid market EAI grows to \$519.4 million by 2008.

Companies Profiled

Market Leaders

IBM Corporation
Tibco
webMethods
BEA
Global eXchange Services
Microsoft
SeeBeyond
Sybase
Vitria
Mercator

Other Market Participants

| | |
|------------------------------------|---------------------------|
| Altova | MQ Software |
| BMC Software | Neon Systems |
| Candle Corporation | Oracle |
| Fiorano Software | Rai (Resource Adapters) |
| Interwoven | SAP |
| Information Builders/iWay Software | SAS Institute |
| Iona Technologies | Select Business Solutions |
| ItemField | Sopra/Viewlocity |
| Level 8 | Software AG |
| M2 Systems | Sun Microsystems/iPlanet |
| Kabira Technologies | SunGard/Mint |
| Manhattan Associates/Logistics.com | Systinet |

Mid Market (SMB) Application Integration Market Strategies and Forecasts, 2003-2008

REPORT METHODOLOGY

THIS IS THE HUNDRED AND THIRTIETH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, AND TELEPHONE EQUIPMENT. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT.

YOU MUST HAVE THIS STUDY

Mid Market (SMB) Application Integration Market Opportunities, Strategies, and Forecasts, 2003 to 2008

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT WILL EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

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