

WINTERGREEN RESEARCH, INC.

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

Application Integration Market Assessment



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

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CHECK OUT THESE KEY TOPICS

INTEGRATION DRIVES INCREASES THE EFFICIENCY OF DOING BUSINESS

AI Market Strategies

AI Market Positioning

AI Market Growth Opportunities

End to End Solutions – Adapters, Rules, Workflow

Business Process Management Systems

AI MARKET FORECASTS

WORLDWIDE MARKET SHARES

MARKET TRENDS

RULES ENGINES

ADAPTERS, ROUTING ENGINES

TRANSFORMATION ENGINES, WORKFLOW

BUSINESS PROCESS MANAGEMENT

Integration Broker Market Shares

EAI Market Shares

BUSINESS PROCESS ANALYSIS

OPPORTUNITY ABOUNDS

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Application Integration Market Opportunities, Strategies, and Forecasts, 2003 to 2008

IT managers in the enterprise to improve the efficiency of internal network communication and implement external B2B and Internet exchange operations using application integration. Vendors are implementing return on investment tools that operate in the background to gather metrics that prove the efficiency of the integration systems.

Networks have made integration systems an essential aspect of doing business. Businesses rely on significant integration of servers to address the business needs of division, partners, distributors, and other affiliated groups to achieve efficient information access, enterprise-wide communication, and business process systems automation. Application integration (AI) permits businesses to achieve a level of integration that improves business efficiency.

IBM led the market in 2002 gaining 22% market share. The vendors with a broad market presence grew while the other market participants lost market share. IBM had significant growth of 50% for the WebSphere Integration product suite. This is a significant market achievement in the context of a market that grew overall at less than 1% for the year.

IBM growth was stimulated by the broad portfolio offering with a range of tools for designing and customizing processes and integration.

The IBM WebSphere product suite is positioned as an integration portfolio that provides a range of tools useful for implementing integration projects. IBM and Tibco are among the market participants that support customizing processes and integration. Ranges of dashboards are available from IBM and others to permit users to achieve a role based view of business activity.

IBM WebSphere business integration portfolio is focused on providing functionality to the business analyst and to the process manager. IBM tools include WSAD-IE useful to the integration specialist.

IBM tools are converging on the Eclipse platform, which provides a common infrastructure and a set of standards for repositories. Team development and testing are supported. Integration is useful both for solving business problems and for building new applications. IBM is particularly focused on permitting IT departments to

integrate information assets from heterogeneous systems. This is the source of IBM market strength.

Competitive pressures, macroeconomic volatility, corporate mergers, acquisitions, the Internet, shortened product development times, shortened production cycles, shifting supplier relationships, and diverse customer demands are forcing companies to adapt to changing market conditions. Markets in every industry need application integration solutions that are reliable, secure, centrally managed, and scalable to a very large number of disparate users. The business and economic environment presents companies with challenges that can only be met by real time exchange of transaction information.

Application Integration supports implementation of aggressive e-Business initiatives. Business transactions and relationships are conducted electronically over networks. Networks need to support messages that hold transactions.

The e-business initiatives need application integration to operate more efficiently and communicate better with suppliers, customers and partners. Companies have made significant investments in a range of custom and packaged software applications such as enterprise resource planning, or ERP, supply chain management, or SCM, customer relationship management, or CRM, decision support, and e-Commerce technologies.

The application integration software license market grew .8% in 2002 to reach \$1.285 billion, up from \$1.265 billion in 2001. IBM is the market leader followed by Tibco and WebMethods. Markets are expected to grow in 2003 reaching \$1.4 billion. By 2008 application integration software license revenue is expected to be \$3.1 billion reflecting the need to use integration to conduct commerce over networks and to support ongoing business analysis.

Companies Profiled

Market Leaders

International Business Machines (IBM)
Tibco Software / Talarian
webMethods
GXS
SeeBeyond
BEA
Mercator
Vitria Technology
Sybase / New Era of Networks
Microsoft

Other Market Participants

Microsoft
IONA
Information Builders / iWay Software
ItemField
Level 8
Oracle
Peregrine / Extricity
Progress Software / Sonic Software
RosettaNet
Sagent
SAP
Sopra / Viewlocity
Software AG
SunGard / Mint
WebEx Communications

Application Integration (EAI) 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

**Application Integration (EAI) Market Opportunities,
Strategies, and Forecasts,
2002 to 2007**

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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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