

WINTERGREEN RESEARCH, INC.

**High Availability / High Reliability Computing Software
Market Opportunities, Strategies, and Forecasts,
2003 to 2008**

High Availability Market Assessment



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

HIGHLY AVAILABLE SOFTWARE STRATEGIES

High Availability Market Forecasts

High Availability Market Shares

Industry Specific High Availability Issues

High Reliability E-Mail and Conferencing

High Availability On Demand Computing

CLUSTERING SOFTWARE

ADAPTER TECHNOLOGY

HIGH AVAILABILITY DATABASE

END TO END MANAGEMENT

PARTITIONING

HIGH AVAILABILITY LINUX PLATFORMS

STORAGE AREA NETWORKS

STORAGE INNOVATION

BUSINESS PROCESS ON DEMAND

HIGH AVAILABILITY USING APPLICATION SERVERS

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.

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**High Availability / High Reliability Computing Software
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High availability computing is positioned to be a major catalyst in revolutionizing the deployment of Web services. High availability is emerging as a platform of choice for data centers in every industry and for Internet servers due to its economic and management efficiencies.

Many global 2000 businesses are doubling their data every year. As Global 2000 businesses become more global in their operations, applications and data must be available all of the time.

The fundamental market driving forces for high availability systems are the need to provide network data centers and the need to respond to e-business market opportunities. As back end systems are linked to front-end systems high availability is more of a dominant market factor.

Benefits of high availability servers relate to the fact that systems are positioned as an integration platform. High availability supports the integration of multiple servers, storage, Ethernet switches, and networking. High availability systems are available at reduced cost in comparison to other servers.

High availability is achieved by the implementation of application servers, wirespeed messaging, and clustering. Worldwide application server software markets at \$1.8 billion in 2002 are expected to reach \$2.9 billion by 2008. Worldwide wirespeed messaging engines are designed to be accessed from a desktop and to support transfer of messages securely. Markets at \$10 million in 2002 are expected to reach \$104 million by 2008

Companies Profiled

Market Leaders

BEA
Candle
Fiorano
Fancisco Partners/GXS
Hewlett-Packard
IBM Corporation
Information Builders / iWay Software
IONA
Kabira Technologies
Mercator Software
Microsoft
M2 Systems
MQSoftware
SteelEye Technology

Other Market Participants

Oracle
SAP
RAi (Resource Adapters)
See Beyond
Software AG
SAP
Sopra / Viewlocity
Software AG
Sun Microsystems / iPlanet
Sybase
Tibco
Vitria
WebMethods
WebEx Communications

High Availability / High Reliability Computing Software 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

**High Availability / High Reliability Computing Software
Market Opportunities, Strategies, and Forecasts,
2003 to 2008**

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ABOUT THE COMPANY

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ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

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