WINTERGREEN RESEARCH, INC.

Mission Critical Messaging Middleware Market

Opportunities, Strategies, and Forecasts,

2003 to 2008

Application Integration 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

NETWORK COMPUTING

Mission Critical Middleware Messaging Market Shares

Middleware Market Forecasts

Market Opportunity

Embedded Distributed Messaging

Middleware System Management

PERFORMANCE OPTIMIZATION

MIDDLEWARE MESSAGING TECHNOLOGY ISSUES

MISSION CRITICAL MESSAGING ISSUES

HIGH PERFORMANCE

EAI REGIONAL ANALYSIS

GLOBAL EXCHANGE SERVICES

PARALLEL MESSAGE PROCESSING

JAVA MESSAGE SERVICES (JMS)

ADAPTER BROKERS

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Mission critical messaging middleware (MOM) core cross platform software has become central to transaction transport and network integration. Middleware messaging is positioned to provide cross platform transport of transactions. Mission critical packaged software hides transport and API complexity from the IT manager.

Mission critical messaging and application integration middleware depend on systems managers to achieve visualization of messages and control of the systems. A significant benefit of mission critical middleware messaging is in the area of open connectivity. The best middleware products provide a consistent mechanism by which a wide variety of types of system can be connected together.

Mission critical messaging provides access to cross platform applications and a transport mechanism that is secure Connecting platforms provides the enterprise with the ability to make applications work together. Mission-critical means having a professional resources organization dedicated to the success of the enterprise.

To improve operational efficiency, heterogeneous applications and their users need to access the same and most up-to-date data. Companies are relying on application integration messaging technologies to ensure that system information and updates are delivered across applications in real time.

The middleware computing paradigm is leading to global installation of the networking equipment to support connectivity within and across organizations. Broadband communications pathways are being put in place. Applications need to operate in unpredictable and heterogeneous wide area networks, including the Internet. Middleware messaging provides a robust, comprehensive software infrastructure.

The worldwide middleware messaging market at $415 million in 2002 is expected to reach $822 million by 2006 The market will increase over the 2003-2008 forecast period as new systems are designed to support mission critical transport of integration modules. Mission critical messaging system management accounted for 63% of the markets in 2002. EAI broker system management accounted for 37%. By 2008, the percentages shift.

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Companies Profiled

Market Leaders

IBM Corporation
Candle
BMC Software
Trivoli
MQSoftware
Tibco
Envoy
Sonic MQ

Other Market Participants

BEA
Foriano
Kabira
MQSoftware
See Beyond
Sopra / Viewlocity
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Sybase

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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.

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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.

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.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULITPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

WINTERGREEN RESEARCH, INC.

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