

*WinterGreen Research, Inc.*

*MISSION CRITICAL MESSAGING MIDDLEWARE*

*(MOM)*

*FORECASTS AND STRATEGIES TO 2006*



**SEE WHAT IS OVER THE HORIZON**

**THE ROOTS OF MISSION CRITICAL MIDDLEWARE  
MESSAGING SPREAD DEEP INTO THE HEART OF THE  
INDUSTRY, SUSTAINING A STRONG BASE TO LEAN ON**

**MISSION CRITICAL MIDDLEWARE  
MESSAGING,**

**Positioning TO PARTICIPATE IN HIGH  
GROWTH Internet Business to Business  
Exchange SEGMENTS**

**MARKET STRATEGIES AND FORECASTS  
TO 2006**

**CHECK OUT THESE KEY TOPICS**

*Middleware messaging provides a robust, comprehensive software infrastructure.*

**MOM Market Strategies**

**MOM Market Positioning**

**MOM Market Growth Opportunities**

**End to End Solutions**

**Products interconnect disparate applications, platforms and networks**

**MOM MARKET FORECASTS**

**WORLDWIDE MARKET SHARES**

**MISSION CRITICAL MIDDLEWARE MESSAGING**

**RULE ENGINES**

**SWITCHES, ROUTERS, ADAPTERS, ROUTING ENGINES**

**TRANSFORMATION ENGINES, PUBLISH SUBSCRIBE**

**Integration Broker Markets Shares**

**MOM Cross Platform Market Shares**

Data networking equipment depends on infrastructure software to support the computing shift. Infrastructure software has traditionally been developed in-house and is often inadequate for the performance and scalability demands of networked business environments. This problem is exacerbated by rapidly growing numbers of users and volumes of data, the proliferation of diverse computing devices, such as mainframes, UNIX and NT servers, PCs, and handheld and wireless devices.

Increasingly stringent performance and reliability requirements are found in the market. A real-time infrastructure must connect applications running across a variety of private and public networks, including the Internet. Most existing systems were designed assuming a local area network or other small, well-controlled, homogenous network.

Applications need to operate in unpredictable and heterogeneous wide area networks, including the Internet. Middleware messaging provides a robust, comprehensive software infrastructure. Products interconnect disparate applications, platforms and networks, so that they can distribute and share information in real-time. Internet business environments represent a

significant change form the past, providing the ability to make decisions based on real time information.

**REPORT METHODOLOGY**

THIS IS THE FORTY FIRST 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. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, 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 OPINION LEADERS IN THE MARKET SEGMENT.

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## Companies Profiled

<p><b>BEA</b> <b>BMC</b> <b>Candle</b> <b>Commerce Quest</b> <b>IBM</b> <b>Level 8</b> <b>LogiSys</b></p>	<p><b>Microsoft</b> <b>MQSoftware</b> <b>Talarian</b> <b>Talarian Revenue</b> <b>Talarian Customer Base</b> <b>Tibco Software</b></p>
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### EXECUTIVE SUMMARY MISSION CRITICAL MESSAGING

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***MANY OF THESE KEY TOPICS HAVE PHENOMENAL SUBCATEGORIES***

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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 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 micro-computing and parallel processing. She has patents on the first electronic voting machine, and has patent applications for new voting machines, new multi-processors, the operating system for the Internet, and has developed a new n-dimensional mathematics. She is the author of recent studies of the Regional Bell Operating Companies' marketing strategies, Internet equipment, a study of Internet Equipment, Worldwide Telecommunications Equipment, Top Ten Telecommunications, Digital Loop Carrier, Web Hosting, and Application Integration markets. Ms. Eustis is a graduate of Barnard College.

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