

Mission Critical Middleware Messaging Market Shares, Strategies, and Forecasts, Worldwide, 2014 to 2020

Mountains of Opportunity



Picture by Susan Eustis

WinterGreen Research, Inc.

REPORT # SH25981943

535 PAGES

192 TABLES AND FIGURES

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CHECK OUT THESE KEY TOPICS

Mission Critical Middleware Messaging Markets Driven by Cloud Computing, Mobile Apps, and Internet of Things

Cloud, Mobile Devices, Tablets, and Sensor Networks Need Middleware Messaging

Middleware Messaging
Web Services
E-Commerce
Cloud Technology
Middleware Messaging
Drives Web Services and SOA
Middleware Messaging
Cross Application
Cross Platform Data
Exchange
Once and Only Once
Asynchronous Message
Delivery
Message Delivery Server

Application Server
Web 2.0
Wiki-Style Collaboration
Social Networking
Business Process
Management
Virtualized Systems
Open Source Application
Server
WinterGreen Research
Web Assets
JBOSS
SOA Reusable Software
Components

Virtualization
Server Hosting Centers
Web Properties
Web Application Gallery
Web PI
Collaboration
Mashups
Web services
Web Analytics / Frameworks
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Middleware Messaging Growth Strategy: Internet Based Real Time Applications, Mobile and Internet of Things Messaging.

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Mission Critical Middleware Messaging: Market Shares, Strategies, and Forecasts, Worldwide, 2014-2020

LEXINGTON, Massachusetts (May 27, 2014) – WinterGreen Research announces that it has published a new study **Mission Critical Middleware Messaging: Market Shares, Strategy, and Forecasts, Worldwide, 2014 to 2020**. The 2013 study has 503 pages, 192 tables and figures. Worldwide markets are poised to achieve significant growth as middleware messaging becomes the foundation for cloud computing and enterprise participation in mobile markets. Mobile device messaging and messaging for the Internet of things are driving markets.

According to Susan Eustis, lead author of the WinterGreen Research team that prepared the middleware messaging market research study, “Cloud, mobile, and collaboration are leveraging mission critical messaging. Messaging supports information exchange between mobile devices. The Internet of things is driving messaging uptake. IBM is the dominant vendor, providing reliable messaging for enterprises and tying together open systems software messaging systems with wrappers. It is used to support exchange of information among servers because of the tremendous reliability provided.”

Smart phones and tablets change the markets for IT systems implementation, increasing the need for mission critical decoupled messaging. The communication of data is a demanding task whereby often there is trouble if a message that is sent does not get through or contra-wise if a message that is sent goes through twice. When there is a person on one or both sides of the message sending, human intelligence is able to deal with the problem if the message does not get sent, or if it gets sent twice, but for a machine to machine communication, the anticipation of difficulty has to be built into the system.

Mission critical messaging middleware from IBM is the base for software systems integration projects used to implement smart phone apps, mobile applications for the web, cloud computing, and enterprise collaboration suites. IBM WebSphere MQ is the IT industry defacto standard for mission critical information messaging. The IBM WebSphere MQ product continues to completely dominate the enterprise middleware messaging market.

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IBM WebSphere MQ is used in the front end distributed systems to interconnect Java messaging when once and only once mission critical capability is needed. It is used on the back end mainframe systems to connect the mainframe to various databases and to distributed systems. IBM WebSphere MQ is a key component used to manage quantum increases in the quantity of data being generated.

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Mission critical messaging provides cross platform, cross application support for once and only once delivery of packets of information of files across the network. It is supporting enterprise response to business change. By providing a foundation base for services oriented architecture (SOA), mission critical messaging enables the distributed, globally integrated enterprise to interconnect people and sensors over the Internet.

Decoupled message transport is a significant aspect of modernized IT. It is the base for Cloud, SOA, collaboration tools, and virtualized IT. IBM WebSphereMQ is a defacto industry mission critical messaging standard because it is used quadrillions of times per day worldwide to transport messages between applications. IBM WebSphereMQ is used as a wrapper for other HTTPS, JMS, and SOAP application messaging. It is used to achieve FTP transport.

Mission critical messaging represents a major aspect of IT as data processing moves away from a stack and into an SOA ESB services cloud computing environment that relies on transport. The value of mission critical messaging for SOA is that it leverages a services bus ESB computing environment. Cloud computing is creating new economies of scale for virtualized IT. Data centers are moving away from siloed applications and batch processing to real time systems.

As real time systems are implemented in the cloud, what were scale out distributed server farms for each separate application is giving way to virtualized systems that run simultaneously on one platform. IBM WebSphereMQ becomes a significant aspect of virtualization because it is so good at managing decoupled messages.

This study illustrates the mission critical middleware messaging market driving forces. It describes the principal competitive factors that impact the success of mission critical messaging solutions. Market pitfalls and market opportunities are addressed in the comprehensive market study that lays out strategy considerations in considerable detail: Worldwide mission critical messaging markets at \$10.3 billion in 2013 are anticipated to reach \$32.7 billion in 2020, indicating growth based on implementation of mobile smart phone network connectivity, tablet use for mobile computing, Internet apps, cloud computing, SOA, and business process management systems (BPM) that support collaboration

WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Global Information Info Shop, Market Research.com, Research and Markets, electronics.ca, Bloomberg, and Thompson Financial. WinterGreen Research is positioned to help customers facing challenges that define the modern enterprises. The increasingly global nature of science, technology and engineering is a reflection of the implementation of the globally integrated enterprise. Customers trust wintergreen research to work alongside them to ensure the success of the participation in a particular market segment.

WinterGreen Research supports various market segment programs; provides trusted technical services to the marketing departments. It carries out accurate market share and forecast analysis services for a range of commercial and government customers globally. These are all vital market research support solutions requiring trust and integrity.

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Companies Profiled

Market Leaders

**IBM
Tibco
Red Hat
Fiorano**

**Microsoft
Fujitsu
Attachmate / Novelle
Oracle**

Market Participants

**GSX
Hewlett Packard (HP)
Information Builders
Workday
Apache
AgilePoint
Fiorano
Hewlett Packard
HostBridge
Informatica / Active EndPoints
iWay Software**

**K2
Kofax
Layer 7
OpenText
Managed Methods 5-61, 5.15.1
Managed Methods
Microsoft1
Nastel
NEC
Oracle
Perficient**

**Progress Software
Rally Software
Red Hat
Rocket Software
SAP
Software AG
Tibco Software
WSO2
VMWare**

Mission Critical Middleware Messaging: Market Shares, Strategies, and Forecasts, Worldwide, 2014 to 2020

Report Methodology

This is the 598th report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and energy. Automated process and significant growth potential are priorities in topic selection. 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.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

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 participant 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. We establish accurate market forecasts based on economic and market conditions as a base. Use input/output ratios, flow charts, and other economic methods to quantify data. Use in-house analysts who meet stringent quality standards.

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Interviewing key industry participants, experts and end-users is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2010. With 2010 and several years prior to that as a baseline, market projections were developed for 2011 through 2017. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective.

The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models. The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

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Mission Critical Middleware Messaging Market Shares, Strategy, and Forecasts, 2014 to 2020

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IBM Dominates Markets with New Mobile and Cloud Messaging Systems

Mission Critical Messaging Middleware Executive Summary

The study is designed to give a comprehensive overview of the Mission Critical Messaging Middleware equipment market segment. Research represents a selection from the mountains of data available of the most relevant and cogent market materials, with selections made by the most senior analysts. Commentary on every aspect of the market from independent analysts creates an independent perspective in the evaluation of the market. In this manner the study presents a comprehensive overview of what is going on in this market, assisting managers with designing market strategies likely to succeed.

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Mission Critical Messaging Middleware Product Description

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This section describes selected companies and selected products. Products for this market segment are described with attention to the most significant aspect of features and functions in this category of product. The juxtaposition of a range of different product descriptions from a single market category provides a really good way to access market directions and achieve market competitive analysis. This section is useful because it compliments other views of innovation, providing a clear presentation of all the alternatives for positioning products in this market. Company products are described in the appropriate sections, meaning a company is mentioned several times in the chapter in different places. 3-1

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This section selectively describes company strategies, partners, acquisitions, and revenue by segment and regional revenue when available. Companies are described by looking at what is most interesting about that company. The descriptions collectively give a sense of market directions within the industry segment. The alphabetical listing of company thumbnail sketches provides an accessible way to find out what is going on in any particular company.

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- **Fully Integrated Solution:** Layer 2/Layer 3 switching fabric natively integrates with existing networking backbones and TIBCO FTL®, the industry's fastest messaging middleware platform.
- **Extreme Performance and Reliability:** Eliminates the need for multiple boxes – delivering improved message performance, reliability, and manageability in a convenient, easily deployable, hardware-based solution.
- **Rapid Application Development:** Seamlessly integrates with existing applications and infrastructure components via easy-to-use APIs for C, Java, and .NET.
- **Rapid Deployment and Messaging Provisioning:** Highly modular, fault-tolerant, and self-healing design enables exceptional operational flexibility with network virtualization – making zero-touch provisioning of virtual machines and network services a reality.
- **Enterprise-Class Resilience and Performance:** Resilient and extensible messaging middleware draws on more than 20 years of industry-leading experience in high-performance messaging technology and is based on an enterprise-class UNIX operating system (includes Pluribus Networks nvOS) – proven to provide continuous availability and scalability in demanding, mission-critical environments.
- **Out-of-the-Box Fault-Tolerance:** Prevents downtime and data loss in the event of switch failures by providing continuous messaging availability to applications.
- **Cutting-Edge Technology:** Harnesses innovative breakthroughs in hardware technology. Includes high performance multi-core processors and support for 1, 10, and 40 Gb Ethernet connectivity.
- **Optimized Network Performance:** Streamlines messaging protocol to minimize intra-host network traffic and maximize throughput for high-volume environments (or those where bandwidth is limited).

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ABOUT THE COMPANY

WinterGreen Research, research strategy relates to identifying market trends through reading and interviewing opinion leaders. By using analysis of published materials, interview material, private research, detailed research, social network materials, blogs, and electronic analytics, the market size, shares, and trends are identified. Analysis of the published materials and interviews permits WinterGreen Research senior analysts to learn a lot more about markets. Discovering, tracking, and thinking about market trends is a high priority at WinterGreen Research. As with all research, the value proposition for competitive analysis comes from intellectual input.

WinterGreen Research, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care, Software, Internet, Energy Generation, Energy Storage, Renewable energy, and advanced computer technology. Industry reports focus on opportunities that expand existing markets or develop major new markets. The reports access new product and service positioning strategies, new and evolving technologies, and technological impact on products, services, and markets. Innovation that drives markets is explored. 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.

The studies provide primary analytical insight about the market participants. By publishing material relevant to the positioning of each company, readers can look at the basis for analysis. By providing descriptions of each major participant in the market, the reader is not dependent on analyst assumptions, the information backing the assumptions is provided, permitting readers to examine the basis for the conclusions.

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 is a senior analyst. She 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, multiprocessing, and electronic voting. She is the author of recent studies of the Solar Renewable Energy, Wind Energy, Thin Film Batteries, Business Process Management 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. Susan Eustis was named as top female executive of the year by Who's Who Worldwide in 2012. She was named page one of the top 100 Industry leaders in Who's Who Worldwide in 2013.

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