

WINTERGREEN RESEARCH, INC.

**Enterprise Messaging Platforms and Wirespeed
Messaging 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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INTERNET BUSINESS SOLUTIONS

Wirespeed Market Forecasts

Wirespeed Market Shares

Wirespeed Market Growth Opportunities

Mission Critical System Positioning

Basic Internet Transport Protocols

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INTEGRATION ENGINES

INTERACTIVE DASHBOARD TECHNOLOGY

XML PLATFORM STRATEGY

REVENUE LEAKAGE SOLUTIONS

MISSION CRITICAL MARKET SHARES

TELECOMMUNICATIONS CONCERNS/MARKETS

MESSAGING MARKET DRIVING FORCES

MESSAGING TARGET MARKETS

BASIC INTERNET TRANSPORT PROTOCOLS

OPPORTUNITY ABOUNDS

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Enterprise Messaging Platforms and Wirespeed Messaging Market Opportunities, Strategies, and Forecasts, 2003 to 2008

Wirespeed messaging is used to achieve speed, flexibility and scalability for secure mission critical transaction processing. Advanced technology implements next-generation architecture.

Gateways are used to develop and deploy open, standardized, enhanced services across multiple networks. Integration of multiple physical network technologies is achieved with wirespeed messaging. Modules are used to introduce features and services.

Rate plans and pricing are more aggressive than has been possible in the past. Gateways allow the integration of network capabilities with enterprise data not traditionally found in the networks. And systems operate more efficiently. Service providers, ISV's, and developers are the target market. IT and telecommunication applications can use wirespeed messaging to achieve access to different information.

The market driving forces of wirespeed messaging include the need to achieve speed, flexibility, and scalability. Used for secure mission critical transaction processing. Advance technology implements next generation architecture. Gateways used to develop and deploy open, standardized, enhanced services across multiple networks. Vendor specific APIs. Messaging significant factor in a range of industries.

Analysis of distributed mission critical messaging market shares indicates that IBM is the market leader. Distributed mission critical messaging markets are the result of automating and packaging systems integration. IT departments are largely dependent on home grown systems to automate the transfer of information between isolated centers of computing. The automation of that process brings enormous efficiency to the systems business

The ability to provide messaging at the transport layer of the network means that applications can be developed more quickly. The use of mission critical messaging at the transport layer means that developers can separate the business process logic from the message transport logic. Frameworks can be used to create new e-services. Kabira is the only market participant with measurable market share, therefore is the leader in wirespeed messaging in 2002 with 85% market share. IBM and Tibco participate in the market because of their leadership in the mission critical middleware markets.

Wirespeed infrastructure switch supports high-volume real-time events, transactions, and connections to other systems. Active caching is performed. Bursts of traffic are handled. Infrastructure can connect all the way down to the hardware or network element layer in both directions. The software infrastructure switch issues commands directly to hardware. It accepts events, alerts, and status off of hardware. Network level real-time software is enabled. Infrastructure switches offer a powerful, high performance, standards-based software infrastructure. Underlying technology supports tens-of-thousands of events per second on commodity Unix platforms. 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

Wirespeed messaging is expected to be used in a range of industry segments. The ability to transport information over the networks securely, in a mission critical manner represents a fundamental aspect of doing business. Wireless market constraints represent an example of the types of uses for which wirespeed transport is significant. Capacity concern is causing wireless service providers to make difficult choices. As the number of wireless ata subscribers and services grow, minutes of use are growing exponentially. A compliant wirespeed messaging platform is useful,

Wirespeed messaging is used to integrate existing IT and network system processes into a unified service execution platform. Wirespeed messaging is used to optimize wireless data rate plans, pricing plans, provisioning, and service activation processes.

GPRS and CMDA networks are using messaging gateways to launch and deploy email, pre-paid, and data services to subscribers. Benefits of the gateway relate to lower cost. Rapid integration of SMS, MMS, switches, and IP routers can be achieved. Messaging at the wirespeed level is kept separate from the application logic.

Applications are transactional with guaranteed message delivery. 24 by 7 availability is a significant market driver. Framework services deliver fail-over, authentication, load balancing, registration, and discovery services.

Companies Profiled

Market Leaders

**IBM Corporation
Kabira Technologies
Fancisco Partners/GXS**

Other Market Participants

**Adobe Systems
Altova
Abortext
BEA
Brio Software
Candle
DataPower
Fiorano
IXIASOFT
IONA
Information Builders / iWay Software
ItemField
Microsoft
M2 Systems
Progress Software
RAi (Resource Adapters)
Red Hat
Rosebud Technologies
Rosetta Net
Software AG
SAP
Tibco
Vitria
WebMethods
WebEx Communications**

Wind River

Enterprise Messaging Platforms and Wirespeed Messaging 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

Enterprise Messaging Platforms and Wirespeed Messaging Market Opportunities, Strategies, and Forecasts, 2003 to 2008

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