

WINTERGREEN RESEARCH, INC.

**XML Processing and Wirespeed Messaging Market
Opportunities, Strategies, and Forecasts, 2003 to 2008**

XML Processing and Wirespeed Messaging



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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CHECK OUT THESE KEY TOPICS

*XML PROCESSING, WEB SERVICES SECURITY, DEVELOPMENT TOOLS,
MANAGEMENT, AND APPLICATION ROUTER MARKET SHARE AND MARKET
FORECASTS*

Wirespeed XML Processing

XML Acceleration

XML Decoupling

WEB SERVICES MANAGEMENT

XML COMPRESSION

DATABASE XML STORAGE

XML SECURITY

DISTRIBUTED COMPUTING ENVIRONMENTS

XML SERVICES MANAGEMENT

XML WIRESPEED MESSAGING PRODUCT POSITIONING

XML PROCESSING

OASIS SECURITY ASSERTION MARKUP LANGUAGE (SAML)

WEB SERVICES ACCESS CONTROL TECHNOLOGIES

OPPORTUNITY ABOUND

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XML Processing Markets

What the profiled XML and wirespeed message processing markets have in common is the optimization of application processing. What were previously layer 7 application processing tasks become layer 1 network processing tasks. As part of the optimization process, the application functionality is moved from layer 7 to the network layer, to layer 1 or layer 2. Hardware runs faster than software. Compression and XML optimization work better than open systems processing.

XML Processing Market Size

Markets at \$86 million in 2002 are expected to reach \$2 billion by 2008. The strong growth is a result of the economies of scale brought by the network systems that implement savings of a factor of ten to fifty over processor and layer 7 application processing costs.

This shift in the applications markets is looked at from a number of perspectives, but particularly from the Web services perspective, from the impact that XML has on servers and processing. Application processing is that which performs workflow, analysis, business process implementation, and transaction management. XML processing can be moved from the application layer to the network layer, which means the XML processing can be optimized in a manner that is not possible at the application layer.

EAI application integration has been performed at the application layer. Some of that processing is moving to the network layer in the form of application routing.

The routing of EAI modules means that the components are smaller, that the integration process is shifted to one that means solving integration problems by gluing together groups of discrete functions that implement simple business processes.

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. Vendor specific APIs have been a significant factor in a range of industries. The remarkable capabilities of WebSphere MQSeries are related to the fact that the APIs support cross platform, cross operating system functionality. The cross operating system functionality for APIs have been useful because the messaging is separate from application logic. Framework services are provided based on making the data independent of the transport means.

Integration of multiple physical network technologies is achieved with wire speed messaging. Modules are used to introduce features and services.

XML Processing and EAI Application Routing

XML processing and application routing have a range of market segments that are loosely connected by the need to optimize transaction transport at the wirespeed layer of the network. By doing discrete tasks at the network wirespeed layer, systems can be optimized to perform a particular task.

Optimization of XML processing is a fundamental aspect of offloading specific processing tasks from general-purpose application servers. The network management and security tasks are central to network efficiency. Moving XML processing from the application servers to network devices is a major market innovation.

XML compression packages are needed to permit movement of large volumes of XML information across the network. XML markup tends to inflate file sizes relative to application-specific, text or binary formats. Routing, caching and security services in the context of compression algorithm delivery represent the next generation of e-business XML optimization. Companies are deploying XML as the engine for Web services. XML is central to efforts to use Web services to save writing and developing new applications. Web services permit companies to gain flexibility and interoperability from their applications. For Web services to work well, they need to be secure, available and scalable. Therefore, they need to be managed well. When Web services are mission critical, they need to be managed. Unicode strings are a key part of the XML standard. The ability to handle multiple character sets is central to systems. This Unicode capability is driving the adoption of systems worldwide.

XML acceleration and compression systems depend on an integration infrastructure stack. Decoupling complex XML processing tasks from the application infrastructure permits the implementation of simpler, modular solutions that can be linked at a higher level of end point processing. Decoupling supports simpler transport signaling. XSL transformation (XSLT) and XML/Web services security can be managed separately.

Market Share Leaders

Sarvega and DataPower are leaders in intelligent XML-aware network infrastructure. IBM is a leader in Web services development tools. Cast Iron XML hardware application router solution simplifies business integration. The Cast Iron application router is the mind share leader in improving the cost and ease of connecting business applications with different protocols and data formats. Actional is the Web services management market-share leader. Kabira is the market share leader in wirespeed messaging.

IBM, WebMethods, and Iona are among the web services market leaders. Altova XMLSPY is the leading XML development tool set with over 90% market share for XML editors. Westbridge is a market leader in XML security.

Companies Profiled

Market Leaders

Intelligent XML

Sarvega
DataPower Technology

Application Router

Cast Iron Systems

Web Services Development Tools

IBM Corporation

Web Service Management

Actional

Wirespeed Messaging

Kabira Technologies

Web Service Leaders

IBM Corporation
WebMethods
Iona

XML Development Tool Set – XML Editors

Altova

XML Security

Westbridge Technology

Other Market Participants

ACS
AGiLiENCE
AmberPoint
BEA
Blue Titan
BMC Software
Candle Corporation
eXcelon Corporation
Fiorano Software
Flemenco Networks
Forum Systems
Fujitsu
Grand Central Communications
Infravio
Intelligent Compression Technologies (ICT)
Microsoft
MQSoftware
Neocore
OASIS
ObjectStar
Reactivity
See Beyond
Service Integrity
Software AG
Sona Innovations
Sopra/Viewlocity
SunGard/Mint
Sybase
Systinet
Talking Blocks
Tarari
Tibco
XML Global Technologies
Xyleme

XML Processing 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

XML Processing and Wirespeed Messaging Market Opportunities, Strategies, and Forecasts, 2003 to 2008

Table of Contents

XML PROCESSING AND WIRESPEED MESSAGING EXECUTIVE SUMMARY

XML PROCESSING AND WIRESPEED MESSAGING EXECUTIVE SUMMARY	ES-1
Wirespeed XML Processing	ES-1
XML Processing and EAI Application Routing	ES-2
XML Web Services	ES-3
Wire Speed XML Processing	ES-5
XML Business Process e-Services	ES-7
XML Challenges For An Organization Increase Exponentially	ES-13
Next Generation Internet Software	ES-13
XML Accelerator Core Technology	ES-14
XML Compression	ES-16
XML Compression Market Driving Forces	ES-17
XML Processing, Wirespeed Messaging/EAI, and XML Tools/Management Summary Market Shares	ES-20
XML Processing and Wirespeed Messaging Summary Market Forecasts	ES-22

XML NETWORK ACCELERATION, SECURITY, AND SYSTEMS MANAGEMENT MARKET DYNAMICS AND MARKET DESCRIPTION

1. XML NETWORK ACCELERATION, SECURITY, AND SYSTEMS MANAGEMENT MARKET DYNAMICS AND MARKET DESCRIPTION	1-1
1.1 XML De Facto Integration Systems Standard	1-1
1.1.1 Standard For Business Information Exchange On The Web	1-2
1.1.2 XML Compression	1-3
1.2 XML Useful In Integration Of Voice And Data Onto OneNetwork	1-4
1.3 XML Switching	1-5
1.3.1 Accelerator Cards	1-6
1.4 IT Department Challenges	1-6
1.5 Next Generation Of Internet Software	1-8
1.6 Network Appliances	1-12
1.6.1 Switching Technology Enabled With XML Wirespeed Compression Technology	1-14
1.7 Distributed Computing Environments	1-15
1.7.1 Need For Greater Sophistication Of Integration Technology	1-16
1.7.2 Business Process Management (BPM)	1-16
1.7.3 Business Process Management Benefits	1-19
1.7.4 Analyzing Real-Time Data Flowing Through The Integration System	1-22
1.8 XML Security	1-24
1.9 Business-Critical Applications Over The Web	1-26

XML PROCESSING AND WIRESPEED MESSAGING MARKET SHARES AND MARKET FORECASTS

2. XML PROCESSING AND WIRESPEED MESSAGING MARKET SHARES AND MARKET FORECASTS	2-1
2.1.1 Wirespeed XML Processing Optimizes Systems To Achieve Speed, Flexibility, And Scalability	2-1
2.1.1 XML Processing and EAI Application Routing	2-3
2.1.2 XML Compression	2-3
2.1.3 XML Compression Market Driving Forces	2-4
2.1.4 XML Processing, Wirespeed Messaging/EAI, and XML Tools/Management Summary Market Shares	2-6
2.1.5 XML Processing, Wirespeed Messaging/EAI, and XML Tools/Management Segment Market Forecasts	2-9
2.1.6 XML Processing and Wirespeed Messaging Summary Market Forecasts	2-12
2.2 XML Processing Market	2-14
2.2.1 XML Accelerator Market Driving Forces	2-15
2.2.2 XML Accelerator Market Shares	2-17
2.2.3 XML Accelerator Market Forecasts	2-19
2.3 Web Services Security Market	2-21
2.3.1 Web Services Security Market Driving Forces	2-21
2.3.2 XML Security Market Shares	2-25
2.3.3 XML Security Market Forecasts	2-26
2.4 XML Development Tool Market	2-28
2.4.1 XML Development Tool Market Driving Forces	2-29
2.4.2 XML Development Tool Market Shares	2-30
2.4.3 XML Development Tool Market Forecasts	2-32
2.5 Wirespeed Messaging Achieves Speed, Flexibility, And Scalability	2-34
2.5.1 Wirespeed Messaging Positioned As Mission Critical System	2-37
2.5.2 Wirespeed Messaging Market Shares	2-37
2.5.3 Wirespeed Messaging Market Forecasts	2-39
2.6 Web Services Management	2-42
2.6.1 Web Services Management Market Driving Forces	2-42
2.6.2 Web Services Management Market Shares	2-43
2.6.3 Web Services Management Market Forecasts	2-45
2.7 XML Application Router Market	2-47
2.7.1 XML Application Router Market Driving Forces	2-47
2.7.2 XML Application Router Market Leading Participant	2-48
2.7.3 XML Application Router Market Forecasts	2-49
2.8 Summary XML Processing, Development and Management, and Messaging and Routing	2-51
2.8.1 XML Processing Market Forecasts	2-52
2.8.2 XML Development and Management	2-54
2.8.3 Application Processing	2-56

XML ACCELERATION NETWORK AWARE INFRASTRUCTURE PRODUCT DESCRIPTIONS

3. XML ACCELERATION NETWORK AWARE INFRASTRUCTURE PRODUCT DESCRIPTIONS	3-1
3.1 XML Acceleration	3-1
3.1.1 DataPower Technology	3-1
3.1.2 Model-Based Data Design Environments	3-2
3.1.3 DataPower XG3™ Technology	3-2
3.1.4 DataPower XML Accelerator	3-3
3.1.5 DataPower XA35 XML Accelerator Applications	3-5
3.1.6 DataPower XML Accelerator Core Technology	3-6
3.1.7 DataPower Open XML IDE	3-8

3.1.8	DataPower XSLT	3-8
3.1.9	Sarvega XPE Appliances Decouple XML Processing Tasks	3-9
3.1.10	Sarvega XPE 2000	3-10
3.1.11	Sarvega XML EventStream Operating System (XESOS™) Technology	3-11
3.1.12	Sarvega XML XESOS™	3-12
3.1.13	Sarvega XESOS™ Services	3-15
3.1.14	Sarvega XESOS™ Security Policy	3-15
3.1.15	Tarari XML Content Processor	3-16
3.1.16	Agilience Real-Time Information Logistics	3-17
3.1.17	Agilience Xpeerion Intelligent XML-Warehousing And Processing Technology	3-21
3.2	XML Wirespeed Messaging Product Positioning	3-22
3.2.1	IBM Serves All Product Areas	3-22
3.2.2	Types Of Business Integration	3-23
3.2.3	Mission Critical Transaction Messaging	3-24
3.2.4	IBM WebSphere® MQ Mission Critical Transaction Messaging	3-25
3.2.5	Router Based Wirespeed Messaging	3-27
3.2.6	Cisco Wirespeed Messaging	3-27
3.2.7	Wirespeed Integration Engines	3-32
3.2.8	Kabira Active Caching	3-32
3.2.9	Kabira Wirespeed Messaging Solution	3-34
3.2.10	Kabira Infrastructure And Solutions Built On The OMG Model	3-35
3.2.11	Kabira Vertical Solution Frameworks	3-35
3.2.12	Kabira Automatic Generation of Adapters	3-36
3.2.13	Kabira Service Package	3-36
3.2.14	Kabira Data Implementations	3-38
3.2.15	Kabira OSA Gateway	3-39
3.2.16	Kabira XML Adapter Generator	3-41
3.2.17	Kabira Valid XML	3-42
3.2.18	FioranoMQ	3-43
3.2.19	FioranoMQ XML Content Based Routing	3-45
3.2.20	FioranoMQ Client Side Persistence / Caching	3-45
3.2.21	Tarari Secure XML Content Processing At Wire Speed	3-46
3.3	XML Decoupling	3-48
3.3.1	IBM CrossWorlds® Process Integration	3-49
3.3.2	IBM CrossWorlds® Process Integration Software	3-49
3.3.3	IBM Adapter Development Tools	3-60
3.3.4	IBM WebSphere Adapters	3-63
3.3.5	IBM® WebSphere MQ Adapter Builder	3-67
3.3.6	Kabira Adapter Factory	3-67
3.3.7	Fiorano Infrastructure Stack	3-68
3.3.8	NeoCore Self-Constructing Native XML Database Solution	3-69
3.3.9	NeoCore XMS	3-69
3.4	XML Compression	3-73
3.4.1	XML Compression, Querying, SAX Parsing	3-73
3.4.2	Compression Engine	3-73
3.4.3	Querying Engine	3-75
3.4.4	Oracle XML Compression	3-75
3.4.5	XMill Compressor For XML	3-76
3.4.6	XMLPPM: XML-Conscious PPM Compression	3-77
3.4.7	Intelligent Compression Technologies XML-Xpress™	3-78
3.4.8	Combining Filters For Multiple Formats Into A Single Compression Engine	3-78
3.4.9	Zip Compression Engine	3-79

3.5	XML Security	3-80
3.5.1	Packaged Products Replacing Homegrown Security Solutions	3-81
3.5.2	XML Data-Level Security Imperative	3-81
3.5.3	DataPower XS40 XML Security Gateway	3-82
3.5.4	DataPower XML Security Applications	3-85
3.5.5	Reactivity Network Security Appliances	3-87
3.5.6	Reactivity XML Firewall	3-87
3.5.7	XML Security Gap	3-87
3.5.8	Reactivity XML Firewall Solution	3-88
3.5.9	Reactivity For Business Managers	3-91
3.5.10	Reactivity For Development Managers	3-91
3.5.11	Reactivity For Operations Managers	3-92
3.5.12	Reactivity For Auditors and Compliance Managers	3-92
3.5.13	Reactivity Architecture	3-92
3.5.14	IBM XML Security Suite	3-96
3.5.15	Tibco XML Security Validation	3-96
3.5.16	Kabira Parlay/OSA Architecture	3-98
3.5.17	Kabira Parlay/OSA Framework	3-98
3.5.18	Westbridge	3-101
3.5.19	Westbridge Technology XML Firewall	3-101
3.5.20	Westbridge Technology Intelligent Application Network Solutions	3-103
3.5.21	Westbridge XML SOAP and WS-Security Compliant Interface	3-104
3.5.22	Westbridge XML Architecture	3-105
3.5.23	WebMethods XML Security	3-109
3.5.24	webMethods Open Security Standards Initiative	3-110
3.5.25	Fiorano Security	3-111
3.5.26	Forum Systems XML Security Challenge Positioning	3-112
3.5.27	NetScaler Security Positioning	3-121
3.5.28	NetScaler Secure Application Gateway	3-123
3.5.29	NetScaler Application Traffic Security and Availability	3-125
3.5.30	Fujitsu Customer-Focused Information Communications Solutions	3-139
3.5.31	Fujitsu and Microsoft	3-140
3.5.32	Fujitsu Interstage	3-140
3.5.33	OASYS	3-140
3.6	XML Routing	3-141
3.6.1	Cast Iron Systems	3-141
3.6.2	Cast Iron Application Router	3-142
3.7	XML Development	3-143
3.7.1	IBM	3-143
3.7.2	IBM WebSphere Application Server XML Development	3-144
3.8	XML Services Management	3-146
3.8.1	Amber Point XML Applications Monitoring, Managing, Securing And Upgrading	3-147
3.8.2	AmberPoint Management Foundation	3-149
3.8.3	Westbridge XML Reporting and Monitoring Tool	3-154
3.8.4	XML Global Technologies Centralized Management	3-154
3.8.5	Tibco Software XML Management Solutions	3-155
3.8.6	Sona Mobile Data Market	3-156
3.8.7	Blue Titan Control Layer For Web Services	3-158
3.8.8	Service Integrity Web Services Management Solution	3-160
3.8.9	Talking Blocks Comprehensive Management And Integration Of Web Services	3-163
3.8.10	Actional	3-164
3.8.11	Actional UDDI Web Services Management	3-164

3.8.12	Actional Looking Glass Web Services Management Platform	3-165
3.8.13	Actional Performance Dashboard Monitoring	3-169
3.8.14	Actional Root Cause Failure Analysis	3-170
3.8.15	Actional Policy Definition and Deployment	3-170
3.8.16	Actional Analysis and Planning	3-171
3.8.17	Iona	3-171
3.8.18	Talking Blocks Runtime Service Registry	3-174
3.8.19	IBM Holosofx BPM Management	3-175
3.8.20	IBM Rational	3-175
3.8.21	Infravio	3-176
3.8.22	Fujitsu Systemwalker	3-177
3.8.23	Flamenco Networks	3-178
3.8.24	Westbridge Web Services Management Architecture	3-179
3.8.25	Cast Iron Web Management Console	3-179
3.8.26	NetScaler Switch Web Applications Management	3-180
3.8.27	NetScaler Secure Application Gateway	3-182
3.8.28	NetScaler Secure Application Switch	3-182
3.8.29	NetScaler Delivery Of 4, 400 SSL Sessions Per Second And 450 Mbps Of Encrypted Throughput	3-184
3.8.30	NetScaler Wire Speed System Delivery	3-185
3.8.31	NetScaler Request Switching Technology	3-186
3.8.32	NetScaler Web Optimization	3-186

XML POSITIONING AND INTEGRATION TECHNOLOGY

4.	XML POSITIONING AND INTEGRATION TECHNOLOGY	4-1
4.1	Web Services Access Control Technologies	4-1
4.1.1	XSLTC	4-2
4.2	XML Market Participants	4-2
4.2.1	Cisco	4-2
4.2.2	Iona Interconnects Middleware With Web Services	4-4
4.2.3	Iona XMLBus	4-5
4.2.4	web Methods XML Platform For Enterprise Integration	4-6
4.2.5	webMethods Key Participant in ebXML Process	4-6
4.2.6	webMethods XML Positioning	4-7
4.2.7	IBM Holosofx	4-8
4.2.8	Business Process Management With IBM Holosofx	4-8
4.2.9	IBM WebSphere Business Integration Modeler	4-11
4.2.10	IBM Web Services for DB2 Cube Views	4-13
4.2.11	Apache XML	4-13
4.2.12	Xalan: XSL stylesheet processors in Java and C++	4-16
4.2.13	Apache Xalan	4-17
4.2.14	AxKit: XML-based web publishing in mod_perl	4-20
4.2.15	FOP: XSL Formatting Object processor in Java	4-20
4.2.16	Forrest: Standards-based documentation framework	4-20
4.2.17	Xang: Rapid development of dynamic server pages in JavaScript	4-21
4.2.18	SOAP: Simple Object Access Protocol	4-21
4.2.19	Tibco XMLTransform™	4-22
4.2.20	GXS B2B E-Commerce Network	4-22
4.2.21	GXS EDI	4-22
4.2.22	Fujitsu ConfigPro Configuration Engine	4-23
4.2.23	Contivo Data Mapping	4-24

4.3	XML Development	4-24
4.3.1	Altova	4-24
4.3.2	Altova XMLSPY® 5	4-24
4.3.3	Altova StyleVision 5	4-25
4.3.4	Altova XMLSPY	4-26
4.3.5	Authentic 5	4-27
4.3.6	TIBCO TurboXML™	4-27
4.3.7	Vitria ebXML	4-28
4.3.8	Software AG Tamino	4-28
4.3.9	Computer Associates Unicenter XML	4-29
4.3.10	Apache XLAN XML	4-30
4.3.11	Grand Central XML	4-31
4.3.12	Computer Associates / Ingres	4-31
4.4	Database XML Storage	4-32
4.4.1	Oracle Database XML	4-32
4.4.2	Software AG Tamino XML Server	4-32
4.4.3	Tamino	4-32
4.4.4	Tamino XML	4-33
4.4.5	Tamino Native XML Storage	4-33
4.4.6	Benefits Of Tamino XML	4-35
4.4.7	GoXML™ Database (DB)	4-37
4.4.8	XML Global Technologies GoXML™ Transform	4-39
4.4.9	XML Global Technologies GoXML™ Registry	4-40
4.4.10	Sybase	4-41
4.4.11	Sybase XML Management Package for Sybase Adaptive Server Enterprise	4-41
4.4.12	Sybase XML and Business Information Exchange	4-42
4.4.13	New Era of Networks Adapter for XML	4-43
4.4.14	Xyleme Content Solutions Based On XML And Database Technologies	4-43
4.4.15	Xyleme Zone Server	4-44
4.4.16	Xyleme Repository	4-45
4.4.17	ObjectStar	4-46
4.4.18	ObjectStar Product Portfolio	4-46
4.5	International Organization for Standardization (ISO)	4-48
4.6	OASIS Security Assertion Markup Language (SAML)	4-51
4.6.1	CIDX Common XML-Based Standards For The Chemical Industry	4-53
4.6.2	RosettaNet™	4-53
4.7	J2EE	4-54
4.8	Adapters	4-55

XML COMPRESSION COMPANY PROFILES

5. XML COMPRESSION COMPANY PROFILES	5-1	
5.1	ACS	5-1
5.2	Actional	5-2
5.3	AGiLiENCE	5-3
5.4	Altova	5-4
5.5	AmberPoint	5-5
5.6	BEA	5-5
5.6.1	BEA WebLogic	5-6
5.6.2	BEA Positioning	5-6
5.6.3	BEA Revenue	5-8
5.6.4	BEA Key Customers and Partners	5-9

5.6.5	BEA Momentum In Financial Services	5-11
5.7	Blue Titan	5-12
5.8	BMC Software	5-12
5.8.1	BMC Software and IBM	5-14
5.8.2	BMC Customers	5-15
5.8.3	BMC Software Revenues	5-16
5.9	Candle Corporation	5-18
5.9.1	Candle Profile	5-18
5.9.2	Candle Partnerships	5-19
5.9.3	Candle Management And Availability Technology For Linux	5-19
5.10	Cast Iron Systems	5-21
5.11	DataPower Technology	5-22
5.11.1	DataPower Technology Partnerships	5-22
5.12	eXcelon Corporation	5-23
5.13	Fiorano Software	5-25
5.13.1	Fiorano Tifosi	5-26
5.13.2	Message Content Routing Solution	5-26
5.14	Flamenco Networks	5-28
5.15	Forum Systems	5-28
5.16	Fujitsu	5-29
5.16.1	Fujitsu Major Business Segments	5-30
5.17	Grand Central Communications	5-31
5.18	IBM Corporation	5-32
5.18.1	IBM Revenue	5-34
5.18.2	IBM Manufacturing Outsourcing	5-38
5.18.3	IBM On-Demand Supply Chain	5-40
5.18.4	IBM Acquires Holosofx	5-41
5.18.5	IBM / PricewaterhouseCoopers Consulting	5-42
5.18.6	IBM Acquires Rational Software	5-42
5.19	Infravio	5-45
5.20	Intelligent Compression Technologies (ICT)	5-46
5.21	Kabira Technologies	5-48
5.21.1	Kabira Provisioning And Service Activation	5-49
5.21.2	Kabira Regional Market Presence	5-51
5.21.3	Kabira Customer Base	5-52
5.21.4	Kabira Partners With Siebel	5-53
5.21.5	Kabira Technologies Solutions	5-54
5.22	Microsoft	5-55
5.22.1	Microsoft.Net	5-57
5.22.2	Microsoft BizTalk Server	5-59
5.22.3	Microsoft Strengths and Challenges	5-59
5.23	MQSoftware	5-61
5.24	Neocore	5-62
5.25	OASIS	5-62
5.26	ObjectStar	5-63
5.26.1	ObjectStar Customer Base	5-64
5.27	Reactivity	5-64
5.28	Sarvega	5-64
5.29	See Beyond	5-65
5.29.1	SeeBeyond Customers	5-66
5.29.2	SeeBeyond Partners	5-67
5.29.3	SeeBeyond Revenue	5-68

5.30	Service Integrity	5-71
5.31	Software AG	5-72
5.31.1	Software AG Tamino	5-73
5.32	Sona Innovations	5-75
5.33	Sopra / Viewlocity	5-75
5.33.1	Sopra / Axway / Viewlocity	5-76
5.34	SunGard / Mint	5-76
5.34.1	SunGard Integrated IT Solutions	5-77
5.34.2	SunGard Vision	5-77
5.34.3	SunGard Strategy	5-79
5.34.4	Mint	5-79
5.34.5	FIXML	5-80
5.34.6	Infinity/Network Trade Model	5-80
5.35	Sybase	5-81
5.35.1	Sybase / New Era of Networks	5-81
5.35.2	Sybase Customers And Partners	5-82
5.35.3	Sybase / Digital China	5-82
5.35.4	Sybase / PeopleSoft	5-83
5.36	Systinet	5-84
5.37	Talking Blocks	5-84
5.38	Tarari	5-85
5.39	Tibco	5-85
5.39.1	Tibco Software Revenue	5-86
5.39.2	Tibco Key Customers and Partners	5-88
5.39.3	Tibco / Praja Business Activity Monitoring Dashboard Acquisition	5-88
5.40	XML Global Technologies	5-89
5.41	Xyleme	5-90

List of Tables and Figures**XML PROCESSING AND WIRESPEED MESSAGING EXECUTIVE SUMMARY**

Table ES-1	ES-4
XML Integration Key Solutions Benefits	
Table ES-2	ES-8
XML Business Process e-Services Functions	
Table ES-3	ES-10
XML Business Process e-Services Features	
Table ES-4	ES-11
XML Business Process e-Services Features	
Table ES-5	ES-12
XML Security Features	
Table ES-6	ES-15
XML Accelerator Core Technology	
Table ES-7	ES-19
XML Compression Market Driving Forces	
Figure ES-8	ES-21
Worldwide XML Acceleration and Wirespeed Message Processing Market Shares, 2002	
Figure ES-9	ES-23
Worldwide XML Global XML Processing, XML Management, XML Development Tools, Web Services Security, Application Integration Routers, Wirespeed Messaging Market Forecasts, 2003-2008	
Table ES-10	ES-24
Global XML Processing, XML Management, XML Development Tools, Web Services Security, Application Integration Routers, Wirespeed Messaging Market Forecasts, 2003-2008	

XML NETWORK ACCELERATION, SECURITY, AND SYSTEMS MANAGEMENT MARKET DYNAMICS AND MARKET DESCRIPTION

Table 1-1	1-7
IT Department Challenges	
Table 1-2	1-10
XML Accelerator Solution Issues	
Table 1-3	1-11
XML Accelerator Solution Constraints	
Table 1-4	1-12
XML Web Services Security Functions	
Table 1-5	1-18
Primary Aims Of Business Process Management (BPM)	
Table 1-6	1-20
Benefits Of Business Process Management	
Table 1-7	1-21
Business Process Management (BPM) Software Challenges	

XML PROCESSING AND WIRESPEED MESSAGING MARKET SHARES AND MARKET FORECASTS

Table 2-1	2-5
XML Compression Market Driving Forces	
Figure 2-2	2-7
Worldwide XML Acceleration and Wirespeed Processing Market Shares, 2002	
Table 2-3	2-8
XML Processing, Tools, Management, and Wirespeed Messaging and Application Routing Market Shares, Worldwide, 2002	
Figure 2-4	2-10
Global XML and Wirespeed Message Processing Market Segments, 2002	
Figure 2-5	2-11
Global XML and Wirespeed Message Processing Market Segments, 2008	
Figure 2-6	2-13
Worldwide XML Global XML Processing, XML Management, XML Development Tools, Web Services Security, Application Integration Routers, Wirespeed Messaging Market Forecasts, 2003-2008	
Table 2-7	2-14
Global XML Processing, XML Management, XML Development Tools, Web Services Security, Application Integration Routers, Wirespeed Messaging Market Forecasts, 2003-2008	
Table 2-8	2-16
XML Processing Market Driving Forces	
Figure 2-9	2-18
Worldwide Intelligent XML Accelerator Market Shares, 2002	
Table 2-10	2-19
XML Processing, Tools, Management, and Wirespeed Messaging and Application Routing Market Shares, Worldwide, 2002	
Figure 2-11	2-20
Worldwide XML Accelerator Market Forecasts, 2003-2008	
Table 2-12	2-21
Worldwide XML Accelerator Market Forecasts, 2003-2008	
Table 2-13	2-22
Web Services Security Driving Forces	
Figure 2-14	2-25
Worldwide XML and Web Services Security Market Shares, 2002	
Table 2-15	2-26
Worldwide XML Security Product Market Shares, 2002	
Figure 2-16	2-27
Worldwide Web Services XML Security Market Forecasts, 2003-2008	
Table 2-17	2-28
Worldwide Web Services XML Security Market Forecasts, 2003-2008	
Table 2-18	2-29
XML Development Tool Market Driving Forces	
Figure 2-19	2-31
Worldwide XML Development Tools Market Shares, 2002	
Table 2-20	2-32
Worldwide XML Development Tools Product Market Shares, 2002	
Figure 2-21	2-33
Worldwide XML Development Tool Market Forecast, 2003-2008	

Table 2-22	2-34
Worldwide XML Development Tool Market Forecast, 2003-2008	
Table 2-23	2-35
Wirespeed Messaging Functions	
Table 2-24	2-36
Wirespeed Messaging Target Markets	
Figure 2-25	2-38
Worldwide Mission Critical Wirespeed Messaging Market Shares, 2002	
Table 2-26	2-39
Wirespeed Mission Critical Messaging Market Shares, 2002	
Figure 2-27	2-41
Worldwide Wirespeed Messaging Market Forecasts, 2003-2008	
Table 2-28	2-42
Worldwide Wirespeed Messaging Market Forecasts, 2003-2008	
Table 2-29	2-43
Web Services Management Market Driving Forces	
Figure 2-30	2-44
Worldwide XML System Management Market Shares, 2002	
Table 2-31	2-45
Worldwide XML Management Product, Market Shares, 2002	
Figure 2-32	2-46
Worldwide XML Management Product, Market Forecasts, 2003-2008	
Table 2-33	2-47
Worldwide XML Management Market Forecasts, 2003-2008	
Table 2-34	2-48
Web Services Management Market Driving Forces	
Figure 2-35	2-50
Worldwide XML Application Router Market Forecasts, 2003-2008	
Table 2-36	2-51
Worldwide XML Application Router Market Forecasts, 2003-2008	
Figure 2-37	2-53
Worldwide XML Processing Market Forecasts, 2003-2008	
Table 2-38	2-54
Global XML Processing, XML Acceleration, XML Compression, and Web Services Security Product Market Forecasts, 2003-2008	
Figure 2-39	2-55
Global XML Processing Systems Management and XML Development Tools Market Forecasts, 2003-2008	
Table 2-40	2-56
Global XML Processing Systems Management and XML Development Tools Market Forecasts, 2003-2008	
Figure 2-41	2-57
Global XML Application Routers and Wirespeed Messaging MarketForecasts, 2003-2008	
Table 2-42	2-58
Global XML Application Routers and Wirespeed Messaging MarketForecasts, 2003-2008	

XML ACCELERATION NETWORK AWARE INFRASTRUCTURE PRODUCT DESCRIPTIONS

Table 3-1	3-4
DataPower XA35 Benefits	
Table 3-2	3-7
DataPower XML Accelerator core technology	

Table 3-3	3-11
Sarvega XPE 2000 Features	
Table 3-4	3-12
Sarvega XESOS™ Core XML Functions	
Table 3-5	3-13
Sarvega XESOS™ Core XML Components	
Table 3-6	3-14
Sarvega XML Features	
Table 3-7	3-18
Agilience Solutions Positioning	
Table 3-8	3-19
Agilience Solutions Functions	
Table 3-9	3-20
Agilience Xpeerion Product Positioning	
Table 3-10	3-23
Types Of Business Integration	
Table 3-11	3-26
IBM WebSphere MQ Features	
Table 3-12	3-28
Cisco IP Communications System Components	
Table 3-13	3-31
Cisco AVVID Architecture	
Table 3-14	3-33
Kabira Solution Framework Functions	
Table 3-15	3-37
Kabira Service Package Functions	
Table 3-16	3-38
Kabira Data Implementations	
Table 3-17	3-39
Kabira Address Plan Management	
Table 3-18	3-44
FioranoMQ Positioning	
Table 3-19	3-47
Tarari Wire Speed XML Content Processing Features	
Table 3-20	3-51
Selected IBM CrossWorlds® Collaborations For Pre-Built Solutions For Business Process Automation	
Table 3-21	3-53
IBM CrossWorlds Collaboration Categories	
Table 3-22	3-54
IBM CrossWorlds Collaboration Benefits	
Table 3-23	3-55
Selected IBM CrossWorlds Solutions	
Table 3-24	3-56
IBM Connector Access Frameworks	
Table 3-25	3-58
IBM Connector Categories	
Table 3-26	3-59
IBM Connector Benefits	
Table 3-27	3-61
IBM Adapters	
Table 3-28	3-62
WebSphere Business Integration Industry Solutions	

Table 3-29	3-63
Selected WebSphere Adapters	
Table 3-30	3-64
Variety of IBM WebSphere Adapters	
Table 3-31	3-68
Fiorano Key Solutions Benefits	
Table 3-32	3-71
NeoCore XMS Features	
Table 3-33	3-82
Essential Elements Of A Comprehensive XML Web Services Security Solution	
Table 3-34	3-83
DataPower XS40 XML Security Gateway Functions	
Table 3-35	3-85
DataPower XML Security Applications	
Table 3-36	3-88
Reactivity XML Firewall Network Security Device	
Table 3-37	3-89
Reactivity XML Firewall Security Solution	
Table 3-38	3-93
Reactivity Benefits	
Table 3-39	3-95
Reactivity Features	
Table 3-40	3-99
Framework Benefits of Kabira Parlay/OSA APIs	
Table 3-41	3-100
Kabira Framework Database Organization	
Table 3-42	3-102
Key Differences Between Regular Network Firewalls And XML Firewalls	
Table 3-43	3-106
Westbridge XML Message Server Current Feature Set	
Table 3-44	3-108
Westbridge XML Security Feature Set	
Table 3-45	3-109
Westbridge XML Security Rules Engine	
Table 3-46	3-113
Forum Systems Essential Elements Of XML Web Services Security Addressed	
Table 3-47	3-115
Forum Systems XML Web Services Security Functions	
Table 3-48	3-116
Forum Systems XML Analysis Tasks	
Table 3-49	3-117
Forum Systems XML Functions	
Table 3-50	3-118
Forum Systems content security products benefits	
Table 3-51	3-119
Forum Systems XML Forum Sentry™ 1500 Benefits	
Table 3-52	3-120
Forum Systems XML Forum Sentry™ 1500 Secure, Hardened Platform Aspects	
Table 3-53	3-121
NetScaler Security Positioning	
Table 3-54	3-122
NetScaler Secure Application Traffic Metrics	

Table 3-55	3-123
Infrastructure Optimization	
Table 3-56	3-125
NetScaler DDoS Attack Defense	
Table 3-57	3-126
NetScaler Content-Intelligent Intrusion Prevention	
Table 3-58	3-127
NetScaler Surge Protection for Traffic Spikes	
Table 3-59	3-128
NetScaler Response Features	
Table 3-60	3-129
NetScaler Priority Queuing	
Table 3-61	3-130
NetScaler Packet Filtering	
Table 3-62	3-131
NetScaler End-to-End Encryption of Application Data	
Table 3-63	3-132
NetScaler Application Traffic Optimization	
Table 3-64	3-133
NetScaler Bandwidth Scalability	
Table 3-65	3-133
NetScaler Application Traffic Optimization	
Table 3-66	3-134
NetScaler Accelerated End-User Response Time Functions	
Table 3-67	3-135
NetScaler System Management	
Table 3-68	3-136
NetScaler Authentication, Authorization and Audit Functions	
Table 3-69	3-137
NetScaler Layer-4 Load Balancing Functions	
Table 3-70	3-138
NetScaler Layer-7 Switching Functions	
Table 3-71	3-139
NetScaler Distributed Availability with Global Server Load Balancing Functions	
Table 3-72	3-146
XML Services Management Functions	
Table 3-73	3-147
AmberPoint XML Web services Positioning	
Table 3-74	3-151
Benefits of AmberPoint XML Monitoring	
Table 3-75	3-152
AmberPoint Advantages	
Table 3-76	3-153
AmberPoint Features	
Table 3-77	3-157
Sona Mobile Data Market XML Wireless Platform Features	
Table 3-78	3-160
Key features of Service Integrity SIFT	
Table 3-79	3-166
Actional Looking Glass Web Services Management Platform	
Table 3-80	3-167
Actional Looking Glass Web Services Management Platform Business Benefits	

Table 3-81	3-168
Actional Looking Glass Key Capabilities:	
Table 3-82	3-181
NetScaler Switch Web Application Functions	
Table 3-83	3-183
NetScaler Request Switch™ 9000 iON Series Functions	
Table 3-84	3-187
NetScaler Application Traffic Security and Availability	
Table 3-85	3-188
NetScaler End-to-End Encryption of Application Data	
Table 3-86	3-189
NetScaler Application Traffic Optimization	
Table 3-87	3-190
NetScaler Request Switching Traffic Management Techniques	

XML POSITIONING AND INTEGRATION TECHNOLOGY

Table 4-1	4-1
Web Services Access Control Technologies	
Table 4-2	4-3
Cisco XML DTD Data Exchange Features	
Table 4-3	4-5
IONA XMLBus Functions	
Table 4-4	4-9
IBM Holosofx UML Integration Strategy:	
Table 4-5	4-12
IBM WebSphere® Business Integration Modeler Functions	
Table 4-6	4-14
Goals Of The Apache XML Project	
Table 4-7	4-15
Apache XML Sub- Projects	
Table 4-8	4-18
Apache XML sub- projects	
Table 4-9	4-45
Xyleme Zone Server Key Components	
Table 4-10	4-47
ObjectStar Product Categories	
Table 4-11	4-49
ISO's Open Systems Interconnection (OSI) Model Layer Protocols Purpose	

XML COMPRESSION COMPANY PROFILES

Table 5-1	5-33
IBM Strengths and Challenges	
Table 5-2	5-50
Results From Kabira Projects	
Table 5-3	5-52
Kabira Customers and strategic partners	
Table 5-4	5-55
Kabira Technologies Software Solutions	
Table 5-5	5-60
Microsoft Strengths and Challenges	

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