

WINTERGREEN RESEARCH, INC.

**High Availability High Reliability Telecommunications
Middleware Market Opportunities, Strategies, and Forecasts,
2007 to 2013**

High Availability High Reliability



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

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CHECK OUT THESE KEY TOPICS

HIGH AVAILABILITY HIGH RELIABILITY MARKET FORECASTS
High Availability High Reliability Market Shares
High Availability High Reliability Market Driving Forces

Network Service Needs

Service Provider NGN Systems

Wireless Networks

INCREASING AVERAGE REVENUE PER USER (ARPU)

IMPACT OF COMPETITION

MULTIMEDIA MARKETS

MULTI-PROTOCOL TELECOMMUNICATION SYSTEMS

IP TELEPHONY SERVICE SOLUTIONS

OPEN STANDARDS

IP WITHIN CDMA

EGPRS (EDGE)

RATE RECOVERY

MULTIPLEX MODE

OPPORTUNITY ABOUNDS

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High Availability High Reliability Telecommunications Middleware Market Opportunities, Market Forecasts, and Market Strategies, 2007-2013

The convergence of IT and communications infrastructure is placing complex high availability, system clustering, and manageability requirements on system development. These requirements create tremendous problems with respect to scalability, development cost, time-to-market, and resources allocated to core competencies.

Middleware is positioned to decrease ongoing maintenance cost associated with infrastructure software. The consumer and corporate demand for more sophisticated telecom services, the viability of standards technologies and the emergence of new competitors are leading industry players to view COTS software as an imperative.

The technical requirements for deploying real-time services over global networks continue to grow. Applications must work in real-time, with low latency, and scale to millions of users. Yet traditional enterprise software solutions have reached their performance limits. Complex legacy applications are difficult, if not impossible, to grow or change.

The growing shift of the telecommunications market to a modular communications platform architecture will enable carriers to more rapidly deploy new services, reduce operating costs, and easily scale with demand. The success of AdvancedTCA solutions is built from interoperable, carrier grade, high-performance off-the-shelf building blocks including Intel® processors and high availability middleware.

High availability system development requirements are evolving in the context of the evolution of blade servers. Blade servers are small, dense computers tied together with software that balances the processing workload between them. One refrigerator-size mainframe is more efficient than units that hold more than 300 blade servers. The mainframe is significantly more efficient and reliable than 500 of the smallest servers that can fit in the same-size rack. The mainframe systems are far more efficient than densely packed server systems.

High availability high reliability telecommunications middleware market forecasts indicate that markets of \$792.6 million in 2006 are anticipated to reach \$2.1 billion by 2013. Markets are anticipated to grow in response to the need of all equipment providers to adapt to open systems replacing current proprietary middleware systems.

Companies Profiled

Market Leaders

IBM
Fujitsu/Siemens

Market Participants

Aricent Communications Software	BEA
Continuous Computing	GoAhead
Hewlett-Packard (HP)	Huawei
Hughes Communications	Kabria Technologies
Oracle/Stellent	Performance Technologies
RadiSys	SoftwareAG/webMethods
SteelCloud	SteelEye
Stratus	Sun Microsystems
Symantec/Veritas	Tibco
Ulticom	

High Availability High Reliability Telecommunications Middleware Strategies and Forecasts, 2007-2013

REPORT METHODOLOGY

THIS IS THE 301ST REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. 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. 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. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

YOU MUST HAVE THIS STUDY

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. 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.

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ABOUT THE PRINCIPAL AUTHORS

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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.

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