

# **Messaging Middleware Markets Explode -- Strategic Options and Forecasts to 2001**

Messaging middleware supports cross platform data transfer in a secure manner. Message queuing engines are positioned to support application transaction data sharing across applications and across operating systems. IBM MQSeries has become the de facto standard for transaction message data transfer.

The value of middleware messaging is in its simplicity. The need to protect that simplicity is the greatest challenge facing the existing vendor group.

Modularity protects the simplicity of systems. Simple systems are the most successful in the market. They support ease of use. Modular application tools are evolving above middleware messaging that revolutionize application development. Application systems are being evolved that support applications development from looking at one record, and generalizing from that.

Message queuing engines are used to move data from distributed computing environments to back office processing centers. Security and guaranteed delivery represent central data protections offered by middleware messaging systems. These systems are built to scale so the ever increasing large volumes of transaction data can be managed very efficiently. Message systems protect against loss of data when the connection between disparate systems is not available, or goes down.

Push computing has stimulated another type of middleware message passing by providing the base technology for distributed messaging systems. These types of message systems are supporting data transfer across dispersed computing platforms, from one distributed system to another. These systems are built to scale data transmission from one system to many.

- Explosive growth of messaging middleware markets has been stimulated by the Internet.

## **THE STUDY ADDRESSES:**

- Market strategies for participating in high growth messaging middleware market segments
- Strategic positioning of messaging middleware product providers
- Market directions and strategic market alliances
- Risk/reward scenarios -- access to existing customer bases
- Strategies for success

# You NEED This Study

## COMPANIES PROFILED

### COMPANY PROFILES

BEA SYSTEMS  
 CANDLE CORPORATION  
 DIGITAL EQUIPMENT  
 HEWLETT-PACKARD  
 IBM  
 LEVEL 8 SYSTEMS  
 MICROSOFT

MOMENTUM SOFTWARE.  
 NEON (NEW ERA OF NETWORKS)  
 ORACLE CORPORATION  
 PEERLOGIC  
 SUN MICROSYSTEMS  
 TALARIAN  
 TIBCO

## REPORT OUTLINE

### EXECUTIVE SUMMARY

#### 1. MARKET DEFINITION

**Decoupling data from the platform and application**

**Types of messaging middleware**

**Asynchronous communications**

**Internet integration of legacy business applications**

**Message brokers use decoupled data**

**Distributed computing applications**

**Business rules change**

**Virtual enterprise**

E-Business

#### 2. MARKET FORECASTS

**Market opportunities**

**Market growth factors**

**Market description**

**Messaging middleware market forecasts**

Market shares

Market forecasts

Internet

Messaging services

Internet purchases

**Marketing and distribution**

Computer manufacturers

Value added resellers (VARs)

#### 3. MIDDLEWARE MESSAGING PRODUCTS

##### OVERVIEW

##### IBM MQSERIES

Advanced messaging framework

Platforms supported

Framework for e-business

MQSeries gateway products

MQSeries client for Java

IBM connectors

##### TIBCO

Request/reply interactions

Broadcast request/reply interactions

Publish/subscribe interactions

Reliable message delivery

Multicast addressing

##### MICROSOFT

Internet

Positioning for simplicity

Microsoft message queuing server (MSMQ)

Active server

##### BEA SYSTEMS

##### MOMENTUM SOFTWARE.

XIPC

XIPC platform support

Java XIPC

Developing Java applets using the XIPC API

##### NEON

##### PEER LOGIC

##### TALARIAN

#### 4. MIDDLEWARE MESSAGING TECHNOLOGY

##### Internet architecture

##### Networking systems

Web application servers

##### Filters

##### Scalability

##### API Functionality

API LANGUAGES

JAVA LANGUAGE INTERFACE, C++ API

##### Gateways

MQSeries gateway products

LEVEL 8 Systems

ORACLE open gateways

##### Smartsockets

#### 5. COMPANY PROFILES

#### 6. MIDDLEWARE MESSAGING APPLICATIONS

##### FINANCE AND INSURANCE

BARCLAYS BANK  
 PAMUKBANK  
 CHICAGO MERCANTILE EXCHANGE  
 MERRIL LYNCH  
 BANK OF BOSTON  
 NASDAQ  
 LIBERTY MUTUAL INSURANCE  
 FIDELITY INVESTMENTS  
 ERNST & YOUNG  
 BOARD OF TRADE CLEARING  
 CORP. (BOTCC)  
 CNA INSURANCE  
 STANDARD LIFE

**HEALTH CARE**

NIAGARA FALLS MMC

**MANUFACTURING**

MCKESSON  
 FMC  
 ESPRIT  
 NEW YORK POWER AUTHORITY  
 S.D. WARREN  
 CONVERSE

**TRANSPORTATION**

AMERICAN AIRLINES SDT  
 CONRAIL  
 CANADIAN PACIFIC RAILROAD  
 GLOBAL WEATHER DYNAMICS  
 SITA

**TELECOMMUNICATIONS**

WEB SUPPORT  
 JAVATEL  
 SPRINT  
 NYNEX  
 DETECON  
 WESTERN INTERACTIVE MEDIA  
 SIEMENS/ROLM

**INDEPENDENT SOFTWARE VENDORS**

ALPHAREL/OPTIGRAPHICS  
 LOTUS  
 PASSPORT  
 SYMANTEC  
 ADAPT TECHNOLOGIES  
 COMPASSWARE

**INTERNET BUSINESS SERVICES**

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**FORECASTS 1996-2001**

**Market Shares for 1996**

**U.S. Markets**

**Shipments in Millions of Dollars**

Market categories  
 Obstacles to Internet business  
 Messaging middleware solutions  
 Doing business over the Internet  
 Issues and areas of concern around system architecture  
 Central aspects  
 Aspects of message brokers  
 Applications targeted  
 Features that support advanced flow-control

Market opportunities  
 Related markets  
 Market drivers  
 LAN ports, installed base,  
 Installed base of large computing systems  
 Installed base of PCs, US market forecasts,  
 Installed base of PCs, US markets  
 Market shares, 1996  
 Market forecasts, dollars,  
 Worldwide Internet users,

US Internet purchases,  
 Internet/Intranet server software shipments  
 Service markets, dollars,  
 Distribution channels

MQSeries product positioning.  
 MQSeries operating systems and hardware platforms supported  
 Enhancements by MQSeries Web gateways  
 MQSeries Internet gateway operating systems  
 IBM connector suite of tools  
 Tibco Rendezvous features  
 Tibco Rendezvous API functionality  
 Tibco Rendezvous communications process functionality  
 Tibco support for applications interaction  
 Microsoft messaging options  
 Momentum XIPC functions implemented as Java APIs

Internet multi-tier architecture  
 Types of middleware technology  
 Internet middleware market driving forces  
 Internet security market drivers  
 Messaging API support for basic actions  
 API languages  
 Messaging supports communications process

BEA developers conference

**Selected Momentum customers using XIPC.**

**REPORT METHODOLOGY**

This is the twenty-second in a series of market forecasts of Internet data communications, telecommunications, and information services. The project leaders have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases. In-depth interviews are conducted with a broad range of key participants in the market.