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**Mission Critical Middleware Messaging Market
Opportunities, Strategies, and Forecasts 2007 to 2013**

Messaging Middleware



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

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CHECK OUT THESE KEY TOPICS

REPORT # SH29821528 433 PAGES 114 TABLES AND FIGURES 2007 \$3,200

MISSION CRITICAL MESSAGING MIDDLEWARE MARKET SHARES
Mission Critical Messaging License and Maintenance Market
Forecast

Messaging Software

Mission Critical Middleware Messaging

MQ Message Trends

Messaging Software

TYPES OF MISSION CRITICAL MESSAGING

SUPPORT FOR NETWORK COMPUTING

BUSINESS PROCESS ENGINEERING

HIGH PERFORMANCE

MISSION CRITICAL MESSAGING PRODUCTS

MESSAGE QUEUING

MISSION CRITICAL MESSAGE THROUGHPUT

PARALLEL MESSAGE PROCESSING

MIDDLEWARE MESSAGING TECHNOLOGY ISSUES

PERFORMANCE OPTIMIZATION

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.

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Mission Critical Middleware Messaging Market Description, Market Analysis, Product Description, and Company Profiles

Services oriented architecture (SOA) is changing as it moves away from a stack and into an ESB services computing environment that relies on transport. The value of SOA is that it leverages a services bus computing environment that relies on transport. IBM WebSphereMQ is the defacto message transport standard. WebSphereMQ becomes a significant aspect of SOA because it is so good at managing decoupled messages.

The situation was not clear a year ago. There was indication that the stack would be more valuable. But, as SOA takes hold, the value of the robust highly evolved WebSphereMQ becomes apparent. Open systems products and competitive products do not have the market penetration of WebSpherMQ. None of the SOAP, JMS, MSMQ, or other messaging systems have the decoupling functions evolved for WebSphereMQ so they are not positioned to compete effectively in the mission critical messaging market.

Messages are currency. If the messages are not managed in a secure manner, it is like throwing \$1000 dollar bills out the window of a skyscraper. Once and only once delivery is fundamental to evolving a secure transaction network system. As the Internet evolves as the premier business channel, it is fundamental to have secure messaging systems that do not falter ever.

IBM WebSphere handles quadrillions of transaction messages a day because it is secure. The software is transparent. It is easy to set up. WebSphereMQ is a brand that is set to last for a long time because its robust functionality that protects transactions in the context of systems going down, servers not being available, and routers diverting information to obscure locations.

SOA is fundamentally a bus, a transport layer, pulling WebSphere MQ, Tibco Rendezvous, and Sonic into the core of the middleware offering that is able to support all range of functionality needed for flexibility provided by SOA.

IBM WebSphere MQ message nodes are positioned to replace APIs as integration connection points because they are more stable over a period of time. APIs are not stable over the long term and tend to be brittle, while MQ nodes are reliable over a long period of years, positioning those nodes as a connection point for integration systems.

Worldwide backbone connectivity messaging services market share analysis indicates that all the large outsourcing consulting companies participate in the services market, but that IBM has strategic advantage in this segment because of the WebSphere brand and product functionality used by all the large enterprise IT departments worldwide.

Worldwide backbone connectivity messaging markets at \$2 billion in 2005 were \$1.1 billion in the first half 2006, indicating some growth in the first half. The mission critical messaging markets are a subset of backbone connectivity markets that include database messaging, SOAP, JMS, and Scada. Markets are anticipated to continue to be strong because messaging is such a fundamental part of networking.

Worldwide mission critical messaging license and maintenance market steady growth is anticipated, as the Internet emerges as a distribution, supply chain and retail channel par excellence. Network computing does not just stay within the core enterprise, it is a way to move information between partners, colleagues, distributors, and branch offices.

Worldwide mission critical messaging license and maintenance market forecasts are based on the assumption of 16.5% growth overall. Markets at \$718.5 million in 2006 are anticipated to reach \$2.2 billion by 2013.

Companies Profiled

Market Leader

IBM

Market Participants

Applied Technology

BEA

Fiorano

IONA

Oracle

Progress Software

SOA Software

Tibco

webMethods

Art Technology Group

Cape Clear

FusionWare

Novell

PolarLake

Red Hat

Savvion

Vitria

Zeus Technology

Mission Critical Middleware Messaging Strategies and Forecasts 2007-2013

REPORT METHODOLOGY

THIS IS THE 311TH 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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Mission Critical Middleware Messaging Strategies and Forecasts 2007 to 2013

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