

WINTERGREEN RESEARCH, INC.

**Worldwide Mission Critical Middleware Messaging Market
Shares, Strategies, and Forecasts 2009 to 2015**

**Messaging Middleware Leverages Decoupled Message
Transport**



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

MISSION CRITICAL MESSAGING MIDDLEWARE MARKET SHARES

Mission Critical Messaging Market Forecast

Messaging Software

Messaging Appliance

Mission Critical Middleware Messaging

MQ Message Trends

Messaging Software

SOAP

JMS

WEBSPHERE MQ

MSMQ

.NET

BIZTALK

RENDEZVOUS

SONIC MQ

AJAX MESSAGE SERVICE

BUSINESS PROCESS ENGINEERING

HIGH PERFORMANCE NETWORK COMPUTING

MISSION CRITICAL MESSAGING

MESSAGE QUEUING

MISSION CRITICAL MESSAGE THROUGHPUT

PARALLEL MESSAGE PROCESSING

MIDDLEWARE MESSAGING TECHNOLOGY ISSUES

PERFORMANCE OPTIMIZATION

OPPORTUNITY ABOUND

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Worldwide Mission Critical Middleware Messaging Market Shares, Strategy, and Forecasts, 2009 to 2015

LEXINGTON, Massachusetts (July 7, 2009) – WinterGreen Research announces that it has a new study on Worldwide Mission Critical Middleware Messaging. The 2009 study has 596 pages, 180 Tables and Figures. Worldwide mission critical middleware messaging is poised to achieve significant growth as this software is used to achieve transport of information between applications. The markets start to expand to provide productivity improvements for Internet transactions.

IBM WebSphereMQ is the defacto message transport standard. WebSphereMQ becomes a significant aspect of SOA because it is so good at managing decoupled messages. WebSphere MQ is at the center of the IBM middleware offerings because it provides the structure for the bus. SOA depends on web services message transport. SOA is an API with data going into and out of a particular reusable code component. This implies the existence of reliable message transport.

WebSphereMQ is the base for SOA, outperforming the competition from the moment it was developed. WebSphereMQ is installed worldwide, and the MQ nodes are the launch points for SOA because they provide access to APIs. MQ works as advertised, the maintenance fees are not very high, and IBM keeps leveraging the large installed base to develop new functionality, spreading the costs of code improvements across the entire product installed base.

IBM continues to have an entrenched middleware market position secured by a product that does what it says it does and is affordable at every level of the enterprise. The ability to create more functionality supported by a large customer base has provided competitive advantage to IBM.

Mission critical messaging represents a major aspect of IT as it moves away from a stack and into an SOA ESB services computing environment that relies on transport. The value of mission critical messaging for SOA is that it leverages a services bus ESB computing environment. The ESB relies on message transport to move information.

Decoupled message transport is a significant aspect of SOA and the base for all modern IT. WebSphere MQ illustrates the value of mission critical messaging as it is used quadrillions of times per day worldwide to transport messages between applications. MQ messaging is used as wrappers for other HTTPS, JMS, and SOAP application messaging. Business process management BPM is supporting enterprise response to business change by leveraging services oriented architecture (SOA).

Messaging is the fundamental aspect of flexible business process implementation because it is dealing with decoupled components that can be rearranged as needed to form new process. Worldwide backbone connectivity messaging services market forecast analysis indicates that markets are characterized by a lot of variety. Many different message types exist, but not all are equal.

The mission critical messaging markets are a subset of mission critical 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.

Mission critical messaging robust functionality protects transactions as systems go down, servers are not available, and routers divert information to obscure locations. Containers continue to be a defacto industry standard, serving to provide wrappers to SOA SOAP, JMS, SCADA, and HTTPS messages.

Worldwide mission critical messaging license and maintenance market forecasts are based on the assumption growth that comes from use of networks. Networks are able to transport information. Steady growth of mission critical messaging is anticipated as the Internet emerges as a distribution, supply chain and retail channel par excellence and decoupled messages need to be delivered with accuracy.

Network computing does not just stay within the core enterprise; it is a way to move information between partners, colleagues, distributors, and branch offices. With Web services, Java message services, SOAP, .Net, and a range of competing messaging systems, SOA has achieved significant growth leveraging information transport between applications. Competitive challenges in messaging markets relate to SOA.

According to Susan Eustis lead author of the study, “Message delivery that occurs once and only once is efficient. Modules communicate information. Reliability is a central aspect of services oriented architecture because transport is a central part of APIs. SOA leverages the decoupled ESB message structure.” SOA uses decoupled messages to create logic that is flexible and supports recombination of components to create applications that are responsive to changing market conditions.

SOA process components support enterprise change. Software forms the basis of change. Messaging is the fundamental aspect of flexible business process implementation because it is dealing with decoupled components that can be rearranged as needed to form new process.

Worldwide backbone connectivity messaging services market forecast analysis indicates that markets are characterized by a lot of variety. Many different message types exist, but not all are equal. Steady growth is anticipated as the Internet emerges as a distribution, supply chain and retail channel par excellence and decoupled messages need to be delivered with accuracy. 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 markets at \$913 million in 2008 are anticipated to reach \$2.8 billion in 2015, indicating growth based on implementation of SOA. SOA process components support enterprise change. Software forms the basis of change.

Companies Profiled

Market Leader

IBM
Microsoft
Oracle
Progress Software
Tibco

Market Participants

5. MESSAGING MIDDLEWARE COMPANY PROFILES

AmberPoint
BMC
Cisco
EMC
Envoy Technologies
Fineos Corporation
Fine Point solutions
Fiorano
Fujitsu
GXS
Hewlett Packard (HP)
InfoTollgate
Information Builders
MQSoftware
Primeur
Red Hat JBoss Enterprise SOA Platform
SeeWhy
SOA Software
Software AG
Tibco
Vitria Technology
Workday

Mission Critical Middleware Messaging Market Shares, Strategies, and Forecasts 2009-2015

REPORT METHODOLOGY

THIS IS THE 412TH 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 PARTICIPANT 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 IS A CENTRAL PART OF THE STUDY. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

FINDINGS AND CONCLUSIONS OF THIS REPORT ARE BASED ON INFORMATION GATHERED FROM INDUSTRY SOURCES, INCLUDING MANUFACTURERS, DISTRIBUTORS, PARTNERS, OPINION LEADERS, AND USERS. INTERVIEW DATA WAS COMBINED WITH INFORMATION GATHERED THROUGH AN EXTENSIVE REVIEW OF INTERNET AND PRINTED SOURCES SUCH AS TRADE PUBLICATIONS, TRADE ASSOCIATIONS, COMPANY LITERATURE, AND ONLINE DATABASES. THE PROJECTIONS CONTAINED IN THIS REPORT ARE CHECKED FROM TOP DOWN AND BOTTOM UP ANALYSIS TO BE SURE THERE IS CONGRUENCE FROM THAT PERSPECTIVE.

THE BASE YEAR FOR ANALYSIS AND PROJECTION IS 2008. WITH 2008 AND SEVERAL YEARS PRIOR TO THAT AS A BASELINE, MARKET PROJECTIONS WERE DEVELOPED FOR 2009 THROUGH 2015. THESE PROJECTIONS ARE BASED ON A COMBINATION OF A CONSENSUS AMONG THE PRIMARY CONTACTS COMBINED WITH UNDERSTANDING OF THE KEY MARKET DRIVERS AND THEIR IMPACT FROM A HISTORICAL AND ANALYTICAL PERSPECTIVE. THE ANALYTICAL METHODOLOGIES USED TO GENERATE THE MARKET ESTIMATES ARE BASED ON PENETRATION ANALYSES, SIMILAR MARKET ANALYSES, AND DELTA CALCULATIONS TO SUPPLEMENT INDEPENDENT AND DEPENDENT VARIABLE ANALYSIS.

YOU MUST HAVE THIS STUDY

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Worldwide Mission Critical Middleware Messaging Market Shares, Strategies, and Forecasts 2009 to 2015

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MISSION CRITICAL MESSAGING PRODUCT DESCRIPTION

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, RESEARCH STRATEGY IDENTIFIES MARKET TRENDS THROUGH READING MARKET MATERIALS AND INTERVIEWING OPINION LEADERS. **WINTERGREEN RESEARCH TEAM** WORKS TO GATHER PRIMARY INFORMATION FROM COMPANY INTERVIEWS, INDUSTRY MATERIALS, AND COMPANY DOCUMENTS TO WRITE MARKET RESEARCH STUDIES FROM AN INDEPENDENT PERSPECTIVE. THE ABILITY, TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT **WINTERGREEN RESEARCH** IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS AN ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE, INDEPENDENT DATA.

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