

## **MICROSOFT WORLDWIDE OPERATING SYSTEM, APPLICATION, AND TRANSACTION SYSTEM STRATEGIES, FORECASTS TO 2003**

**Consumer operating systems**

**Consumer applications**

**Enterprise servers**

**Application development tools**

**Convergence of voice and data**

**Microsoft has the key to the desktop. Microsoft access to the client directly and through servers is based on functionality that supports the ability for users to solve issues intuitively. Hiding complexity from the user provides another key.**

**THE STUDY ADDRESSES THESE QUESTIONS:**

- **What is happening with consumer PC products?**
- **What is the impact of desktop communications?**
- **How do companies position for client markets?**
- **What are the high growth market sectors?**

### **You NEED This Study**

- **What are the dynamics of Microsoft technology?**
- **Why are companies making strategic alliances?**
- **What are the successful market alliances?**
- **What are emerging market directions?**
- **Who are the best partners?**

### **COMPANIES PROFILED**

**ACTIVE VOICE**  
**ALCATEL**  
**MICROSOFT**  
**AT&T**  
**BEA**

**HEWLETT-PACKARD**  
**INPRISE**  
**IBM**  
**NEON**  
**SUN MICROSYSTEMS**

**SYBASE**  
**SYMANTEC**  
**3COM**

**REPORT OUTLINE**

**EXECUTIVE SUMMARY**

**MICROSOFT OPERATING SYSTEM, APPLICATIONS AND TOOLS STRATEGIES**

Target Markets / PC Operating Systems	Directory Services / Security / E-Mail
Consumer Platforms / IT Operating System Markets	Messaging
Application Development	LAN Connectivity / System Management
Desktop Applications / Interoperability	Configuration / Well Defined Tasks
Server Market Description	Positioned for Knowledge Workers
Interoperable Office Solutions	Training Tools / System Integration
Interapplication and Application / Database	Backward Compatibility / Migration Upgrades
Enterprise Interoperability	Reducing Cost of Ownership
Cross-Platform Application Development	Providing Value / Technology
	ATM / IP Telephony with TAPI 3.0
	Virtual Private Networking

**MICROSOFT PC AND SERVER MARKET FORECASTS**

Market Driving Forces / PC Equipment Markets	Regional Analysis / Shifts in Sales Mix
Server Markets / Platform Licenses and Sales	Handheld / Consumer Operating Systems
PC Application Suites / Server Business Systems	Digital Set Top Operating System
Transaction Server Markets / OEM Analysis	Thin Clients / Pricing / Service Support
Fiscal Revenue / Calendar Year Revenue	Application Development Tools
	Business Analyst Message Broker Market

**PC AND CONSUMER PRODUCTS**

Retail PC Operating Systems	Desktop Applications
Windows 2000 Strategic Positioning	Office / Word / Excel / Access / Powerpoint
Windows 2000 Features and Functions	Outlook 2000 / Productivity Products
ATM with Microsoft Windows	Desktop Finance / Input Devices and Peripherals
IP Telephony with TAPI 3.0	Microsoft Press / Virus Protection
Virtual Private Networking	Desktop Themes / Office Assistant
Consumer Smart Cards	Office 2000 / Event Analysis Tools
Display / Multimedia Support	Interactive and 3D Image Software
Development Tools / Platforms / Windows CE	

**MICROSOFT BUSINESS POSITIONING**

Windows NT Server / Business Strategy	Transaction Processing Monitors
NT Scalability / Availability	Microsoft Cluster Server
RAM Tuning / Management Model	Benefits, Uses Server Clustering / Uses Clusters
Cost of Ownership	Cluster Management / Partner Support
BackOffice / E-Business Positioning	Active Directory-Strategy
Transaction Server	Directory Platform Positioning / Directory Functions
MTS Database Connections	Active Directory / Exchange Integration
ODBC Compliant Database	ADSI / Partners / Development Tools
Transactions / Management Console	Active Directory Namespace Design
Distributed Transaction Coordinator	Remote Management
Component Functionality	Distributed File System / NT Security
Microsoft Message Queue (MSMQ)	IP Security Below Transport Level
Data Access	
MTS Database Servers / MTS Database Support	

Security Configuration Editor / Distributed Security  
Alert / Response Management  
Microsoft Message Queue Server

Distributed Security Services  
SQL Server / Job Scheduling  
Multiuser Technology

## LIST OF TABLES AND FIGURES

# FORECASTS OF MICROSOFT MARKETS

## Worldwide Market Shares 1998

## Worldwide Market Revenue/Units, 1998 to 2003

Microsoft PC application product markets, %	Handheld operating system market forecasts
Microsoft PC application development tools	Handheld positioning and target markets
Microsoft platform and business applications	CE set top box operating systems target markets
Microsoft core business market functions	List prices NT/2000 server / Office / Support – Microsoft technical support
PC operating system functionality	Applications development tools / Market shares
Microsoft consumer platform effort	Business analyst message broker forecasts
Server operating system functions	2000 / Home network / Advanced Internet
Microsoft solutions partners	Multimedia / Target markets
Major Unix vendors shipping COM on systems	Windows CE operating system functionality
Leading systems integrators supporting COM	New class of desktop themes applications
Across mixed-platform environments	Games enterprise strategy parameters
Foundations for information sharing	NT scalability improvements / High-availability
Directory services functions / ADSI functions	NT cost of ownership / E-business positioning
Active directory positioning / Integrated security	Issues for Microsoft transaction server (MTS)
Exchange tools and protocols	Components and functions of (MTS)
NT enabled remote network systems	MTS ODBC driver compliant database features
Key factors driving use of PC's	Microsoft resource dispenser alternatives
Worldwide PC shipments / US PC shipments	Companies ODBC driver committed to MTS
PC commercial / consumer shipments	Transaction processing monitors interoperate
PC installed base, commercial / consumer	Microsoft transaction server (MTS)
Global / U.S. LAN ports, installed base	Server cluster functionality / Administration
Servers installed / E-mail messaging users	Primary benefits / Uses of server clustering
E-mail messaging shipments	Products for MSCS clusters
Worldwide PC operating system shipments	Microsoft directory strategy / Costs / Functions
Microsoft platform product markets percent	LDAP servers / Vendors supporting ADSI API
Microsoft platform products / PC applications	Managable network infrastructure
Microsoft business applications	Active directory namespace architecture
Distributed transaction server market shares	Security combination of technology and policy
Microsoft revenue / Quarterly revenue, segments	Dominion based security model
Microsoft OEM and regional markets percent	High level security / IP security protocol
Microsoft quarterly revenue, OEM and regional	Alert/response management events / SQL tasks
Microsoft regional markets percent / Revenue	Benefits of NT-based thin client terminals
Shifts occurring in the sales mix	
Factors relating to purchase of software	
Palmtop computer products	
Handheld operating system market shares	

### REPORT METHODOLOGY

This is the thirty-fifth in a series of market forecasts of communications, telecommunications, Internet, and computer and telephone equipment. Interface equipment and applications integration form an integral part of telecommunications/data communications market convergence. 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 vendor and user participants in the market. Opinion leaders are interviewed to determine market directions and new product features needed.

**ABOUT THE COMPANY**

WinterGreen Research, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care and advanced computer technology. Industry reports focus on opportunities that will expand existing markets or develop major new markets. The reports assess new product and service positioning strategies; new and evolving technologies; and technological impacts on products, services, and markets. Market shares are estimated. Leading market participants are profiled, and their marketing strategies, acquisitions, and strategic alliances are discussed. The principals of WinterGreen Research have been involved in analysis and forecasting of international business opportunities in telecommunications and advanced computer technology markets for over 30 years.

**ABOUT THE PRINCIPAL AUTHORS**

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 and the Top Ten Telecommunications market analysis and forecasts.

Susan Eustis, President, co-founder of WinterGreen Research, has done research in communications and computer markets and applications. She holds several patents in microcomputing and parallel processing. She is the author of recent studies of the Regional Bell Operating Companies' marketing strategies, Linux, Middleware, EAI, Internet, and Intranet markets. Ms. Eustis is a graduate of Barnard College.

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