

MIDDLEWARE AND E-COMMERCE MARKETS CONTINUE RAPID EXPANSION STRATEGIES AND FORECASTS TO 2002

Enterprise Networks:

Impact of the Internet

Support for e-commerce by middleware

Evolution of message queuing defacto standards

Development of connector technologies

Evolution of packaged interfaces

Implementation of business rules

Growth of enterprise and supply chain networks

Increase in partnering

THE STUDY ADDRESSES THESE QUESTIONS:

- **What are the high growth market sectors?**
- **How do companies position?**
- **Which products are doing well?**
- **How are products targeted?**
- **What are interesting technologies?**
- **What are the successful strategic market alliances?**
- **Why are companies making strategic alliances?**
- **Who are the best partners?**
- **What are market directions?**
- **What are market variations?**

You NEED This Study

Market opportunity analysis

- Shift in data network availability and efficiency
- Need for less costly application interfaces
- Rewriting of traditional mainframe applications into components
- Implementation of distributed and client/server architectures
- Need to link enterprise resources
- Use of wide-area networks
- Adoption of centralized data management
- Increased use of distributed resources
- Rapid growth of the Internet

COMPANIES PROFILED

BEA	Microsoft / MSMQ
BMC	Mint Communication Systems
Boole & Babbage	New Era Of Networks
Candle	(NEON)
Expersoft	Reuters / Tibco
Healthdyne Information (HIE)	TSI
IBM	Vie
Level 8	Vitria
Lynx	

REPORT OUTLINE

EXECUTIVE SUMMARY

1. MIDDLEWARE MARKET

DRIVING FORCES

Network computing
 Message queuing
 On-line transaction servers
 Need for solutions
 Middleware management
 Consulting and services

Competitive positioning

Object brokers
 Message brokers
 Internet and electronic commerce
 Internet users
 Internet hosts
 Managed data network
 Queued messaging services

Tib2MQ

BEA
 BEA MessageQ
 Level 8
 BMC software
 Systems management
 Candle
 Boole & Babbage
 Tivoli
 Distributed transaction processors

2. MESSAGE QUEUING

MIDDLEWARE

Market driving forces
 Summary forecasts
 Message queuing
 Middleware
 Market shares
 Market forecasts
 Systems management
 Online transaction processing

3. MIDDLEWARE

PRODUCTS

Messaging software
 IBM MQSeries
 MQSeries integrator
 MQSeries workflow
 MQSeries configuration
 Resources organized by line of business
 Microsoft MSMQ
 Tibco

BEA Tuxedo
 BEA solution sets
 IBM on line distributed Encina
 On-line transaction
 TXSeries
 Message brokers
 IBM
 Neon
 TSI

Healthdyne Information	5. MIDDLEWARE COMPANY PROFILES	Systems management
Tibco	BEA	Level 8 Systems /
Level 8 systems	BMC	Borders.com / Iona
Talarian	Boole & Babbage	TSI / Sara Lee
Active Software	Candle	TSI / Toronto Dominion
	Expersoft	TSI healthcare
4. MIDDLEWARE TECHNOLOGY	Healthdyne Information	7. MIDDLEWARE SERVICES
Event management	IBM	Message queuing
Recovery logic	IBM Hursley / MQSeries	Distributed transaction
Automatic logging	Transarc	Middleware management
Message selection	Level 8	Candle consulting services
Message recovery services	Lynx	
Security	Microsoft / MSMQ	8. MIDDLEWARE STRATEGIES AND STRATEGIC ALLIANCES
Components / directories	Mint Communication	Partner programs
Encina components	New Era Of Networks	MQSeries partners
Tuxedo directory	Reuters / Tibco	Candle / IBM reseller
Database kernels	TSI	NEON / IBM
Agents	Vie	BMC partners
Desired state management	Vitria	HIE partners
Boole & Babbage	6. MIDDLEWARE APPLICATIONS	TSI partners
BMC Software	Banking and Finance	IBM and Sybase
Microsoft	Utilities	Level 8 / Mitsui
Buffer management	Government	BEA strategic partnerships
Candle	Manufacturing	Management strategy
Topology	Banking	Boole & Babbage / BMC

LIST OF TABLES AND FIGURES

FORECASTS OF MIDDLEWARE EQUIPMENT 1997 To 2002

Worldwide Market Shares 1997 By Region		
Market Forecasts, 1997-2002		
Worldwide Market Revenue/Units By Region		
Middleware summary	Traditional and ERP	Tuxedo
Message brokers	message brokers	administration
Market segments	Internet purchases	TX Series integrity
Driving forces	Internet users	IBM transaction
Market dynamics	Internet hosts	series
Message queuing	Driving forces	Candle MQSecure
Penetration analysis	Message queuing	Candle solutions
Installed LAN ports	Network computing	Level 8 strategy
Middleware service	Middleware adoption	Neon revenue
Management systems	Advantages of queing	MQSeries
Queue monitoring	Distributed	installations
Message queuing	transaction	MQSeries partners
Distributed	Candle tool features	BMC partners
transaction	Boole & Babbage	HIE partners
Competitive factors	BEA strategy	TSI alliance partners
Object broker	Tuxedo benefits	
markets	Production quality	

REPORT METHODOLOGY

This is the twenty-fifth in a series of market forecasts of communications, software, and middleware. 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, 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 primary author of Top 10 Telecommunications Company Strategies and Global Telecommunications Strategies and Forecasts to 2002.

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, Applications Integration and Message Broker Markets, and of studies of Internet and Intranet markets. Ms. Eustis is a graduate of Barnard College.

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