

WinterGreen Research, INC.

**Middleware Messaging Market Shares, Strategies, and Forecasts,
Worldwide, 2011 to 2017**

Middleware Messaging Drives Web Services and SOA

**Middleware Messaging Provides Cross Application, Cross Platform Data Exchange,
Provides Once and Only Once Asynchronous Message Delivery – Message Delivery Even If
the Server is Down**

Mountains of Opportunity



Picture by Susan Eustis

WinterGreen Research, Inc.

Lexington, Massachusetts

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717 PAGES

258 TABLES AND FIGURES

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CHECK OUT THESE KEY TOPICS

Middleware Messaging
Web Services
E-Commerce
Cloud Technology
Middleware Messaging Drives
Web Services and SOA
Middleware Messaging
Cross Application
Cross Platform Data
Exchange
Once and Only Once
Asynchronous Message
Delivery
Message Delivery Server

Application Server
Web 2.0
Wiki-Style Collaboration
Social Networking
Business Process
Management
Virtualized Systems
Open Source Application
Server
WinterGreen Research
Web Assets
JBOSS
SOA Reusable Software
Components

Virtualization
Server Hosting Centers
Web Properties
Web Application Gallery
Web PI
Collaboration
Mashups
Web services
Web Analytics / Frameworks
Java
Linux

Messaging Middleware Growth Strategy: Internet Based Real Time Applications Software

Middleware Messaging: Market Shares, Strategies, and Forecasts, Worldwide, 2011-2017

LEXINGTON, Massachusetts (September 1, 2011) – WinterGreen Research announces that it has a new study on Worldwide Mission Critical Middleware Messaging. The 2011 study has 717 pages, 258 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 business platforms and applications. The markets are expanding in response to demand for real time computing providing productivity improvements across the board and improvements in efficiency of Internet transactions.

Mission critical messaging represents a major aspect of IT as data processing moves away from a stack and into an SOA ESB services cloud computing environment that relies on transport. The value of mission critical messaging for SOA is that it leverages a services bus ESB computing environment. Cloud computing is new in this regard. Data centers are moving away from siloed applications and batch processing to real time systems.

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. WebShpere MQ is the wrapper for SOAP and JMS messages even when it is not the most visible transport messaging system. All mission critical messaging form all vendors implement SOA.

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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 that supports persistent messages. SOA capability is embedded in the middleware. Business process management BPM is supporting enterprise response to business change. By leveraging services oriented architecture (SOA) mission critical messaging . Decoupled message transport is a significant aspect of modernized IT. It is the base for SOA and virtualized IT.

An application server stack is not as flexible as the decoupled mission critical message structure. As SOA takes hold, the value of the robust highly evolved de-facto industry standard WebSphereMQ becomes apparent.

Messaging Middleware Key Benefits

- Increase in channel productivity
- Automation of transaction processing systems
- Implementation of SOA
- Quick response to changing market conditions
- Elimination of manual processes
- 100% payback within one year
- Significant decreases in materials purchasing
- Significant decreases in inventory costs

Open systems products and competitive products do not have the market penetration of WebSphere MQ and SOAP, JMS, MSMQ, and Sonic MQ. Vendor messaging systems are among products that are managed with IBM WebSphere MQ wrappers. Messaging systems have decoupling functions evolved for application to application message transfer. Vendors and open systems are positioned to compete effectively in the mission critical messaging market by leveraging once and only once delivery using wrapper technology.

Architecture and workflow integration enterprise mission critical messaging software is used for replacing internal hand coded solutions. The large vendor customer base spreads the cost of product improvement out over a many, many enterprises, supporting rapid improvement in the overall feature function package.

Supply chain solutions go across corporate boundaries. These solutions relate to providing software that supports the technical capabilities needed to help clients to integrate different back-end distributed systems with a web-enabled front-end.

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 using mission critical messages.

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. The mission critical messaging markets are a subset of mission critical connectivity markets that include

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.

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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 innovation and 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 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 \$6.9 billion in 2010 are anticipated to reach \$20.2 billion in 2017, indicating growth based on implementation of SOA. SOA process components support enterprise innovation and change. Software forms the basis of change. Software development tools drive innovation. Mission critical messaging is a key aspect of both of those.

Market growth is anticipated to be based on implementation of SOA. SOA process components support enterprise change. Software forms the basis of change.

WinterGreen Research is an independent research organization funded by the sale of market research studies all over the world and by the implementation of ROI models that are used to calculate the total cost of ownership of equipment, services, and software. The company has 35 distributors worldwide, including Thompson Financial and Global Information GII Info-Shop.

Key words: Middleware messaging, Web Services Messaging, OASIS Secure, Reliable Transaction, Event-Driven Applications, Publish-Subscribe, Subject-Based Addressing, Location Transparency, Self-Describing Data, IP Multicast, Transaction Delivery Networks, Multicast, Multicast Adapters, SOA Web Services, Middleware Messaging Basic FTP Client, Network Computing, Business Process Management, Transport Layer, Application Server, Web Services, E-Commerce, Cloud Technology, Application Server Blogging, Web 2.0, Wiki-Style Collaboration, Social Networking, Business Process Management, Virtualized Systems, Open Source Application Server, WinterGreen Research, Web Assets, JBOSS, SOA Reusable Software Components, Virtualization, Server Hosting Centers, Web Properties, Web Application Gallery, Web PI, Collaboration, Mashups, Salesforce.com, Web services, Web Analytics / Frameworks, Java, Linux, Middleware Messaging, Web Services, E-Commerce, Cloud Technology, Middleware Messaging Drives Web Services and, SOA, Middleware Messaging Provides Cross Application, Cross Platform Data Exchange, Provides Once and Only Once Asynchronous Message Delivery – Message Delivery even If the Server is Down, Application Server, Web 2.0, Wiki-Style Collaboration, Social Networking, Business Process Management, Virtualized Systems, Open Source Application Server, WinterGreen Research, Web Assets, JBOSS, SOA Reusable Software Components, Virtualization, Server Hosting Centers, Web Properties, Web Application Gallery, Web PI, Collaboration, Mashups, Salesforce.com, Web services, Web Analytics / Frameworks, Java, Linux <http://wintergreenresearch.com/reports/middleware%20messaging.html>

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Companies Profiled

Market Leaders

**IBM
Tibco
Progress Software**

**Microsoft
Fujitsu**

Market Participants

**Middleware Messaging Company
Profiles
Axway
BMC
CA / 3Tera
Cap Gemini Inc.
Deloitte Touche
Fiorano**

**GSX
Hewlett Packard (HP)
Information Builders
Information Builders / iWay
Software
iWay Software
Novell
Oracle**

**RedHat
Software AG
Solase Systems
Vitria
Workday**

**Middleware Messaging: Market Shares, Strategies, and Forecasts,
Worldwide, 2011 to 2017**

Report Methodology

This is the 481st report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health

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equipment, and energy. Automated process and significant growth potential are priorities in topic selection. 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.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

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.

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The base year for analysis and projection is 2010. With 2010 and several years prior to that as a baseline, market projections were developed for 2011 through 2017. These projections are based on a combination of a consensus among the opinion leader contacts interviewed 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. All analyses are displaying selected descriptions of products and services.

This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunications, and hardware businesses.

YOU MUST HAVE THIS STUDY

**Mission Critical Middleware Messaging Market Shares, Strategy, and Forecasts,
2011 to 2017**

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- * Payroll
- * Worker Spend Management
- * Financial Management
- * Benefits Network
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- * Services
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ABOUT THE COMPANY

WinterGreen Research, research strategy relates to identifying market trends through reading and interviewing opinion leaders. By using analysis of published materials, interview material, private research, detailed research, social network materials, blogs, and electronic analytics, the market size, shares, and trends are identified. Analysis of the published materials and interviews permits WinterGreen Research senior analysts to learn a lot more about markets. Discovering, tracking, and thinking about market trends is a high priority at WinterGreen Research. As with all research, the value proposition for competitive analysis comes from intellectual input.

WinterGreen Research, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care, Software, Internet, Energy Generation, Energy Storage, Renewable energy, and advanced computer technology. Industry reports focus on opportunities that expand existing markets or develop major new markets. The reports access new product and service positioning strategies, new and evolving technologies, and technological impact on products, services, and markets. Innovation that drives markets is explored. Market shares are provided. 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.

The studies provide primary analytical insight about the market participants. By publishing material relevant to the positioning of each company, readers can look at the basis for analysis. By providing descriptions of each major participant in the market, the reader is not dependent on analyst assumptions, the information backing the assumptions is provided, permitting readers to examine the basis for the conclusions.

ABOUT THE PRINCIPAL AUTHORS

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