

# **The Network is the Computer:**

## **Applications Integration And Message Brokers.**

### **Strategic Options And Forecasts To 2001**

The evolution of cross platform flow control, data formatters, rules engines, data translators, directories, push computing, and network configuration engines provide new computing capabilities. Products are set to replace homegrown custom built software as customers demand ease of use, version updates, and a robust set of well defined features.

Applications integration is evolving as the operating system of the network. In the same way that a single computer operating system manages the computer, applications integration products locate devices and move data selectively. Decoupled message transport creates a need for products that enhance the message. Message brokers represent a new, evolving type of middleware. Message broker and applications integration markets are poised for 60% per year growth. Markets will grow from \$500 million in 1996 to \$7.3 billion in 2001.

Broadband networks and less expensive, more powerful computing systems are driving the use of data communications over the network. The ability to connect computers from different manufacturers, with different operating systems is creating major new market opportunities. Modular systems are making the enterprise more adaptable to change. The Internet is providing explosive market growth.

Once messages can be transmitted reliably, hiding the complexity of the network from the application, many new opportunities are available to vendors. The value of middleware messaging is in its simplicity. Simple systems support ease of use. Modular products support simplicity of systems. Modular application tools are evolving above middleware message queuing that revolutionize application development. Applications development is achieved by looking at one record, and generalizing an application from that.

Making the network the computer positions the enterprise as flexible and able to adapt to changing market conditions. Message broker markets are poised for growth as new products provide the enterprise with efficient distributed computing. IBM MQSeries has become the de facto industry standard for queuing engines providing a network transfer mechanism that is stimulating the increased use of a range of new system products.

#### **THE STUDY ADDRESSES:**

- **Market strategies for participating in high growth message broker market segments**
- **Strategic positioning of applications integration product providers**
- **Risk/reward scenarios -- access to customer bases of strategic allies**
- **Market directions and strategic market alliances**
- **Strategies for success**

**You NEED This Study**

## COMPANIES PROFILED

<b>AMISYS MANAGED</b> <b>CARE SYSTEMS</b> <b>APERTUS</b> <b>BEA SYSTEMS</b> <b>BMC</b> <b>BOOLE &amp; BABBAGE</b> <b>BROADVISION</b> <b>CANDLE</b> <b>CENTURY ANALYSIS (CAI)</b> <b>CLAREMONT TECHNOLOGY GROUP</b> <b>COMTEC</b> <b>OPEN APPLICATIONS GROUP</b> <b>HEWLETT-PACKARD</b>	<b>IBM / TIVOLI / EARLY, CLOUD &amp; COMPANY</b> <b>LEVEL 8 SYSTEMS</b> <b>MICROSOFT</b> <b>MOMENTUM</b> <b>INFORMIX</b> <b>MCAFFEE ASSOCIATES</b> <b>MERGENT</b> <b>MICROCOM</b> <b>MICROSOFT</b> <b>MILKYWAY</b> <b>MUSCATO</b> <b>NETSCAPE</b> <b>NEON</b> <b>ORACLE</b> <b>PACIFIC BELL</b>	<b>PC DESKGATE</b> <b>PEERLOGIC</b> <b>PRICE WATERHOUSE</b> <b>PROCESS SOFTWARE</b> <b>PSINET</b> <b>QUEST SYSTEMS</b> <b>RAPTOR</b> <b>SAP</b> <b>SECURITY DYNAMICS / RSA DATA SECURITY</b> <b>STERLING SOFTWARE</b> <b>SUN MICROSYSTEMS</b> <b>TALARIAN</b> <b>TIBCO</b>
--	---	--

## REPORT OUTLINE

<b>EXECUTIVE SUMMARY</b> <b>Summary market forecasts</b> <b>Network integration</b> <b>Integration tools</b> <b>1. MARKET DEFINITION</b> <b>Information as a resource</b> <b>Decoupled messaged data</b> <b>Change in the enterprise</b> <b>Collaborative-integration</b> <b>Manual versus automated</b> <b>Leveraging business rules</b> <b>Integration technology</b> <b>Categories of products</b> <b>Integration issues</b> <b>Enterprise modeling</b> <b>Software engineering</b> <b>Computing environments</b> <b>Multiple platforms</b> <b>Intranet</b> <b>2. FORECASTS</b> <b>Driving forces</b> <b>Year 2000 conversion</b> <b>Summary market forecasts</b> <b>Engine markets</b> <b>Que engines, gateways</b> <b>Interface engines</b> <b>Formatting/Transform</b> <b>Rules based engines</b> <b>Configuration engines</b> <b>Push computing</b> <b>Publish subscribe engines</b> <b>Push participants</b> <b>Push computing forecasts</b> <b>Applications vehicles</b>	<b>File transfer</b> <b>Flow manager, Directory</b> <b>System management Ques</b> <b>Development tools,</b> <b>Infrastructure</b> <b>Internet purchases</b> <b>Security, management</b> <b>Communication servers</b> <b>Computer telephony</b> <b>3. PRODUCTS</b> <b>Distributed tools</b> <b>Century Analysis / RSA</b> <b>Microsoft</b> <b>IBM Transarc</b> <b>BEA Tuxedo</b> <b>Candle</b> <b>Database</b> <b>Oracle integration/Sybase</b> <b>Informix modular</b> <b>Data warehouses</b> <b>Oracle</b> <b>Directory services</b> <b>Configuration</b> <b>MSMQ, Peer Logic, CAI</b> <b>Communications servers</b> <b>Computer telephony</b> <b>Lucent</b> <b>Outbound screen dialing</b> <b>Screen synchronization</b> <b>Call center solutions</b> <b>Key benefits</b> <b>Network management</b> <b>Hewlett Packard</b> <b>Security tools</b>	<b>Candle</b> <b>Flow control</b> <b>Oracle flow control</b> <b>Post-MRP scheduling</b> <b>Synchronous manufacture</b> <b>Transaction workflow</b> <b>Middleware messaging</b> <b>Tibco / MQSeries</b> <b>Integration services</b> <b>Candle</b> <b>4. TECHNOLOGY</b> <b>Data transfer needs</b> <b>Development issues</b> <b>Directories</b> <b>Integration procedures</b> <b>Data requirements</b> <b>Database</b> <b>Informix's Datablade</b> <b>Data warehouses</b> <b>File conversion formats</b> <b>Component software</b> <b>ActiveX and OOP, Java, Corba, Open Management</b> <b>Client / server</b> <b>Transaction services</b> <b>Standards</b> <b>Open Applications Group</b> <b>2-tier and 3-tier systems</b> <b>Overlapped applications</b> <b>Clustered systems</b> <b>Transaction management</b> <b>Intranet benefits</b> <b>Component Internet</b> <b>Security control</b>
--	---	--

Architecture	<b>6. MARKETING STRATEGY</b>	Microsoft partners
Rule based models	<b>Business partners</b>	Oracle integration
<b>Graphical user interfaces</b>	Oracle Resellers	<b>Expansion of channels</b>
GIS graphics, Quest motif	Candle and IBM	<b>Applications</b>
<b>5. COMPANY PROFILES</b>	Inside sales initiatives	

**LIST OF TABLES AND FIGURES**

**FORECASTS 1996-2001**

- Market Shares for 1996
- U.S. and Global Markets
- Shipments in Millions of Dollars

**EXECUTIVE SUMMARY**

- Summary Applications Integration Market
- Summary Messaging And Message Broker
- Summary Applications Vehicle Market
- Engines that lie beneath the applications layer
- Toolset application issues
- Applications platforms
- Key elements of an information infrastructure

**1. MARKET DEFINITION**

- Message broker market segments
- Job descriptions of people needing tools
- Issues for IT in distributed computing
- Target markets for enterprise integration
- Systematic software engineering approach

**2. FORECASTS**

- Driving forces for network computing
- Driving forces for applications integration
- Messaging Middleware Market Shares, 1996
- Message Queuing Installed Base Licenses, Global/U.S. LAN Ports, Installed Base, Market
- Global Queuing Engine Penetration Analysis, Middleware Market Shipment Forecasts, Message Queuing Engine Market Shipments
- Message Queuing Gateway Participants, 1996
- Interface Engine Market Participants, 1996
- Transformation And Formatting Engines, Rules Based Engines
- Configuration Engine Market Participants, Configuration Engine Market Forecasts, Push Computing Market Growth Factors
- Publish Subscribe Market Participants
- Push Computing Market Participants
- Selected Marimba Strategic Partners
- Publish Subscribe Engine Market Forecasts
- Channel Push Computing Engine Market
- Cross Platform File Transfer Participants
- File Transfer Market Forecasts, Flow Control Market Participants
- Work Flow Manager Market Forecasts, Directory Market Participants, 1996
- Directory Market Forecasts, Queuing Management Market Shares, 1997

- System Management Penetration
- Queuing System Management Forecasts
- Applications Development Tools Market
- U.S. GNP Forecasts, Worldwide / U. S. Internet Purchases, U.S. Internet Security Market Segment Shares, Worldwide / U.S. Internet Security Market
- Worldwide / U.S. Internet Users
- Worldwide / U.S Network System Management
- Communications Server Market Participants, Communication Server Market Forecasts, Computer Telephony Integration Market

**3. APPLICATION INTEGRATION PRODUCTS**

- Message broker tools integrate
- Vehicles providing infrastructure
- Functions and tasks
- Toolset application issues
- Applications platforms
- Microsoft transaction server development tools
- Interface engines capabilities
- HCI interface engine
- Platforms that generate IBM MQSeries alerts
- Candle multi-platform systems management
- Candle alert adapter platforms
- Candle MQ solution
- Features of Candle MQSecure product
- MQSeries product positioning.
- MQSeries systems and hardware supported
- Tibco Rendezvous features / API functionality

**4. APPLICATIONS INTEGRATION**

**TECHNOLOGY**

- Data transfer / Impact
- Administrative procedures and issues
- Development issues
- Implementing applications integration
- Members of Open Applications Group
- MQSeries message passing.
- Key elements of an interface engine
- Information-management infrastructure
- Corporate Intranet definition and segments
- Enterprise level security architecture
- Security system architecture
- Model for security system rule definition
- Security system access controls
- Rule constraints
- Time based authentication

Authentication history  
5. COMPANY PROFILES  
Ratio of Revenue To Employees  
BEA developers conference  
Momentum customers using XIPC  
Raptor Systems industry segments targeted  
Raptor resellers, integrators, and ISPS  
Security Dynamics strategic partners  
SAP locations

6. MARKETING / STRATEGIC ALLIANCES

Oracle cooperative initiatives  
Microsoft NT strategic alliances / ISPs

REPORT METHODOLOGY

This is the twenty-fourth in a series of market forecasts of data communications, middleware, telecommunications, and information services. 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 participants in the market.