

WINTERGREEN RESEARCH, INC.

**Enterprise Application Integration (EAI) Market
Opportunities, Strategies, and Forecasts, 2004 to 2009**

Enterprise Application Integration (EAI)



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

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CHECK OUT THESE KEY TOPICS

ENTERPRISE APPLICATION INTEGRATION (EAI) MARKET FORECASTS

ENTERPRISE APPLICATION INTEGRATION SEGMENT ANALYSIS

APPLICATION INTEGRATION MARKET TRENDS

Value Of Integration

Business Intelligence

EAI Integration of ERP and Distributed Information

BUSINESS ACTIVITY INTEGRATION

APPLICATION INTEGRATION TECHNICAL ADVANTAGES

EAI INTEGRATION BROKERS

BUSINESS PROCESS MANAGEMENT (BPM)

SERVICE ORIENTED ANALYSIS (SOA)

WEB SERVICES

ENTERPRISE INTEGRATION ANALYSIS

SOFTWARE ENGINES

APPLICATION INTEGRATION FUNCTIONALITY

EAI APPLICATION INTEGRATION MIDDLEWARE PLATFORM PRODUCTS

OPPORTUNITY ABOUNDS

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Enterprise Application Integration (EAI) Market Opportunities, Strategies, and Forecasts, 2004 to 2009

IBM, Tibco and webMethods are vendors with broad enterprise integration product market participation. IBM, Tibco, WebMethods, BEA and SeeBeyond are expected to leverage their position in routing and rules brokers to encompass the full functionality of integration broker suites in the marketplace. Rules engines that provide a brokering capability provide the core of EAI, making it possible to make decisions about information as it is transferred from one application to another.

The business process management segment was the largest portion of worldwide application integration market in 2003. Broker and adapter markets are significant segments as well. This situation is expected to continue with BPM increasingly of value to customers. Adapters were large in the first quarter 2004 but this is anomaly of the market, BPM and brokers are expected to be the largest segments.

The application integration markets have migrated to another level of functionality. EAI is synonymous with the infrastructure for business integration (BI). As the application vendors begin to support connectivity across applications and across platforms, the integration markets are moving to another level of functionality providing business automation.

Worldwide application integration software markets at \$1.1 billion in 2003 decreased in size as many vendors lost market share or exited the business. Many companies moved into other related segments where they could leverage the EAI expertise. Sybase is seeking to interconnect portable devices and databases.

EAI markets are expected to reach \$2.6 billion by 2009. Markets are growing in line with e-commerce adoption. Supply chain automation is a market driving force. Integration of financial services continues apace. Companies in every industry are achieving competitive advantage from the use of EAI technology. It is used to replace batch processing with real time exchange of information. This is a significant market driver that will not go away.

Companies Profiled

Market Leaders

IBM Corporation
Tibco Software
SeeBeyond Technology
WebMethods

Market Participants

Altova
BEA
CommerceQuest
Fiorano
Global eXchange Services
Interwoven
Iona
Kabria
MQSoftware
OATSystems
Progressive Information Technologies
Stellent

Ascential
BMC Software
Deloitte Touche
Fuego
Informatica
Inovis
Itemfield
Microsoft
Neon Systems
Open Text
RedDot Solutions
Vitria

Enterprise Application Integration (EAI) Strategies and Forecasts, 2004-2009

REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND SEVENTEENTH* REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE 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 PARTICIPATION 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.

YOU MUST HAVE THIS STUDY

Enterprise Application Integration (EAI) Market Opportunities, Strategies, and Forecasts, 2004 to 2009

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