

WINTERGREEN RESEARCH, INC.

**High Availability High Reliability Telecommunications
Middleware Market Opportunities, Market Forecasts, and Market
Strategies, 2005-2011**

HA / HR Proprietary Solutions



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

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CHECK OUT THESE KEY TOPICS

HIGH AVAILABILITY HIGH RELIABILITY TELECOMMUNICATIONS MIDDLEWARE

MARKET SHARES

MARKET FORECASTS

Market Driving Forces

Blade Servers

Next Generation Of Telecom Infrastructure

Real-Time Telecom Infrastructure

Telecom Focus

Proprietary High Availability Solutions

Pricing

Interconnect Technology

Open Specification For

Proprietary High Availability Solutions

Cluster Systems

Modular Component-Style Architecture

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.

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**High Availability High Reliability Telecommunications
Middleware Market Opportunities, Strategies, and Forecasts,
2005 to 2011**

Move to Open Standards For High Availability In Telecommunications

Development teams have continued to develop proprietary high availability solutions. These solutions have been proprietary, very expensive to develop, tying up resources that could be better spent on competitive differentiation for their products. They re-invent the wheel. They are not useful in the open systems network architecture.

Reports from multiple sources, including the Service Availability Forum indicate that this situation is changing. Telecommunications equipment providers are beginning to recognize that it is not feasible to continue to pour money into proprietary high availability telecom middleware solutions when less expensive, better open systems are available.

While it is a bitter pill to give up the enormous investment in proprietary high availability telecom middleware solutions, every equipment provider has recognized the need to do so, and is moving toward open systems.

Mature, field-proven solutions are readily available. Development deadlines are short and management is looking to save costs. Using commercial off-the-shelf solutions can save companies 55% in total costs. Equivalent proprietary solutions are no longer feasible.

Using commercial packages moves the costs from fixed people costs to variable license costs. When the market picks up it allows a company to ramp up more quickly, without the expense and delay of hiring and training high availability solutions specialists.

Picking a proven, well-tested commercial software solution reduces the risk of missed deadlines, cost overruns and failure.

Motorola and several other telecom equipment providers are using Go Ahead. Go Ahead has the experience in the market offering footprints that are 4 to 5 times smaller than the closest competition. Clovis Solutions also participates in the market,

The convergence of IT and communications infrastructure is placing complex high availability, system clustering, and manageability requirements on system development.

These requirements create tremendous problems with respect to scalability, development cost, time-to-market, and resources allocated to core competencies.

High availability high reliability embedded infrastructure software for telecommunications middleware market forecasts indicate that markets of \$92.9 million in 2004 are anticipated to reach \$260 million by 2011. Markets are anticipated to grow in response to the need of all equipment providers to adapt to open systems replacing current proprietary middleware systems.

Companies Profiled

Market Leaders

**Clovis Solutions
GoAhead Software
Continuous Computing**

Market Participants

**Augmentix
Concurrent Computer
DIRECTV Group
Hughes Network Systems
Fuego
Kabira Technologies
MontaVista Software
NEC
PDSi 5-50
RadiSys
QNX Software Systems
sentitO Networks
Solid Information Technology
Stratus Computer
Ulticom
Veritas Software**

High Availability High Reliability Telecommunications Middleware Strategies and Forecasts, 2005-2011

REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND THIRTY-THIRD* REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH 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. 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. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

YOU MUST HAVE THIS STUDY

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High Availability Middleware Software for Telecommunications: Market Opportunities, Market Forecasts, and Market Strategies, 2005- 2011

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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, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, 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 HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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