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Mission Critical Messaging Middleware: Market Shares, Strategies, and Forecasts, Worldwide, 2014-2020

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Abstracts

WinterGreen Research announces that it has published a new study Mission Critical Middleware Messaging: Market Shares, Strategy, and Forecasts, Worldwide, 2014 to 2020. The 2013 study has 503 pages, 192 tables and figures. Worldwide markets are poised to achieve significant growth as middleware messaging becomes the foundation for cloud computing and enterprise participation in mobile markets. Mobile device messaging and messaging for the Internet of things are driving markets.

According to Susan Eustis, lead author of the WinterGreen Research team that prepared the middleware messaging market research study, “Cloud, mobile, and collaboration are leveraging mission critical messaging. Messaging supports information exchange between mobile devices. The Internet of things is driving messaging uptake. IBM is the dominant vendor, providing reliable messaging for enterprises and tying together open systems software messaging systems with wrappers. It is used to support exchange of information among servers because of the tremendous reliability provided.”

Smart phones and tablets change the markets for IT systems implementation, increasing the need for mission critical decoupled messaging. The communication of data is a demanding task whereby often there is trouble if a message that is sent does not get through or contra-wise if a message that is sent goes through twice. When there is a person on one or both sides of the message sending, human intelligence is able to deal with the problem if the message does not get sent, or if it gets sent twice, but for a machine to machine communication, the anticipation of difficulty has to be built into the system.

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Mission critical messaging middleware from IBM is the base for software systems integration projects used to implement smart phone apps, mobile applications for the web, cloud computing, and enterprise collaboration suites. IBM WebSphere MQ is the IT industry defacto standard for mission critical information messaging. The IBM WebSphere MQ product continues to completely dominate the enterprise middleware messaging market.

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IBM WebSphere MQ is used in the front end distributed systems to interconnect Java messaging when once and only once mission critical capability is needed. It is used on the back end mainframe systems to connect the mainframe to various databases and to distributed systems. IBM WebSphere MQ is a key component used to manage quantum increases in the quantity of data being generated.

Mission critical messaging provides cross platform, cross application support for once and only once delivery of packets of information of files across the network. It is supporting enterprise response to business change. By providing a foundation base for services oriented architecture (SOA), mission critical messaging enables the distributed, globally integrated enterprise to interconnect people and sensors over the Internet.

Decoupled message transport is a significant aspect of modernized IT. It is the base for Cloud, SOA, collaboration tools, and virtualized IT. IBM WebSphereMQ is a defacto industry mission critical messaging standard because it is used quadrillions of times per day worldwide to transport messages between applications. IBM WebSphereMQ is used as a wrapper for other HTTPS, JMS, and SOAP application messaging. It is used to achieve FTP transport.

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 creating new economies of scale for virtualized IT. Data centers are moving away from siloed applications and batch processing to real time systems.

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As real time systems are implemented in the cloud, what were scale out distributed server farms for each separate application is giving way to virtualized systems that run simultaneously on one platform. IBM WebSphereMQ becomes a significant aspect of virtualization because it is so good at managing decoupled messages.

This study illustrates the mission critical middleware messaging market driving forces. It describes the principal competitive factors that impact the success of mission critical messaging solutions. Market pitfalls and market opportunities are addressed in the comprehensive market study that lays out strategy considerations in considerable detail: Worldwide mission critical messaging markets at $10.3 billion in 2013 are anticipated to reach $32.7 billion in 2020, indicating growth based on implementation of mobile smart phone network connectivity, tablet use for mobile computing, Internet apps, cloud computing, SOA, and business process management systems (BPM) that support collaboration

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About

This is the 598th report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health 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.

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.

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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.

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

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developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunicatons, and hardware businesses.

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