



## Firm Overview

The 451 Group is an analysis firm covering the business of emerging information technologies for a senior executive audience. The firm delivers timely, research-based insight that delves deeply into the dynamics and impact of newly commercialized technologies in all major segments of the enterprise computing marketplace.

The analysts of The 451 Group are uniquely focused at the nexus of technology innovation, corporate strategy and financial/financing impact. The firm's coverage identifies and illuminates the critical issues in emerging markets, and it assesses the product, marketing and business strategies of key market participants. These participants are not only the global IT industry stalwarts and the scale sector leaders, but also emerging specialized players and unusually strong pure plays with an ability to significantly impact the broader marketplace or an important segment. The coverage of the Group's analyst team spans the hardware, software and services aspects of these markets, from the component to the systems level. This marketplace coverage is deepened in the area of acquisitions, investments and mergers through complementary investigation by the Group's weekly M&A analysis service, 451 TechDealmaker. Finally, 451 analysts always deliver briefs, reports and counsel on the leading edge of marketplace activity, which helps clients stay ahead of their competitors.

Clients of The 451 Group are primarily senior executives at technology vendor companies. The firm also serves public market, private equity and venture capital investors. Additional clients include investment banks, management consultancies, marketing communication/public relations firms and other professionals operating in and around emerging information technology markets. A growing number of innovative, early-adopter corporate IT strategists also use the Group's services to tap into future-forward technology trends.

The 451 Group is headquartered in New York, with staff in key regional locations, including San Francisco and Silicon Valley, the Boston/Route 128 area and London. For additional information on the Group or to apply for a client trial online, go to the firm's website: [www.the451.com](http://www.the451.com)

## Analysis Services

The firm delivers its services through both online and live mediums, which include:

- **451 Market Insight Service:** On a daily basis The 451 Group provides 7-10 new tactical market intelligence reports in 4 major sectors, delivered via a password-protected Web portal; sectors covered are:
  - *Enterprise Software*
  - *Storage & Systems*
  - *Mobile technologies*
  - *Networks & Media technologies.*
- **451 TechDealmaker:** This M&A analysis service, also delivered via a password-protected Web portal, serves both finance and corporate development professionals with weekly insight that helps them anticipate future deal activity within the emerging information technology markets covered by The 451 Group. The service includes comprehensive deal tracking, deal-flow metrics and forward-looking research that dissects deal rationale for both past and anticipated transactions.
- **451 Special Reports:** Delivered several times a year to select clients via the Web portal or via hard copy, these lengthy reports cover emerging technology markets and are often the first analysis-firm review of a new market space.
- **451 Strategic Counsel sessions:** Clients of The 451 Group have access to direct counsel from the analyst team through the firm's analyst inquiry program.

## **Analyst Team**

*Notes: All analysts can be contacted via email at “firstname.lastname@the451.com”; coverage below is defined by technology alignment, not regional location – i.e., the proper analyst to address a particular company or technology is determined not by geography but by sector or subsector focus; geographic references are provided below only to identify with which regional office an analyst is affiliated.*

### **EUROPE | LONDON**

- **William Fellows, Principal Analyst – At Large**  
— *Enterprise hardware/software, grid computing, mobile technologies and storage*
- **Christopher Noble, Sector Head for Networks & Media**  
— *Networks and infrastructure*
- **Simon Robinson, Sector Head for Storage & Systems**  
— *Enterprise software and storage management*
- **Steve Wallage, Director of Research**  
— *General sector coverage and Special Reports*

### **EAST COAST | BOSTON/ROUTE 128, NEW YORK AND WASHINGTON, DC**

- **Steve Coplan, Director of Analysis for 451 TechDealmaker and Senior Analyst**  
— *IT business M&A, networks and infrastructure*
- **Robert Deane, Senior Analyst**  
— *Enterprise security*
- **Nick Patience, Managing Analyst and Sector Head for Enterprise Software**  
— *Content and knowledge management, business process management, unstructured data management, collaboration and corporate instant messaging*
- **Tony Rizzo, Sector Head for Mobile**  
— *Mobile enterprise integration and application technologies*
- **Max Smetannikov, Analyst**  
— *Networks and infrastructure*

### **WEST COAST | LOS ANGELES, SAN FRANCISCO AND SILICON VALLEY**

- **John Abbott, Chief Analyst**  
— *Systems, storage and software development*
- **Rachel Chalmers, Analyst**  
— *Web services and software platforms*
- **Jim Davis, Analyst**  
— *Next generation TV, broadband and media services*
- **Ian Jacobs, Analyst**  
— *Enterprise application software*
- **Greg Quick, Analyst**  
— *Semiconductors and hardware*

## How the Firm Delivers Value

The interactive services that The 451 Group provides deliver value to clients in several key ways:

- **Domain expertise; depth of knowledge**  
The 451 Group's analysts possess deep, granular knowledge in their respective technology practice areas – on a product, market and business-model level – which facilitates the delivery of insight that is actionable, accurate and rapidly analyzed.
- **Less words, more value; structured analysis**  
Key issues and their impact and implications are distilled by The 451 Group's analysts into a concentrated form in key categories – ranging from competitive impact to SWOTs – allowing clients to work with only the information and supporting data that is germane to the issue that is being analyzed.
- **Innovation agenda**  
Underlying all of the firm's analysis is a focus on technology innovation, which changes traditional marketplace alignments and results in emerging technology markets that must be carefully considered and understood in an appropriate context.
- **Food for thought; ideas that drive business decisions**  
The 451 Group's briefs, reports and direct counsel are provocative, engaging, well analyzed and well written. More importantly, the reports fuel both thought leadership for company executives and investors, and they provide critical market education for frontline marketing and sales personnel – all leading to smarter, more-profitable business decisions.
- **Objectivity and critical analysis**  
The purpose of the firm's work is to explore critical issues of marketplace and industry concern, often challenging widely held beliefs. To do this, The 451 Group's senior analysts conduct highly directed research, collect critical data, assess it and present insight that is independent, objective and unbiased. Their opinions are unfiltered, yet grounded, and they take account of real market factors, not just so-called demand models and conceptual principles.
- **Interactive relationship with extensive resources**  
The 451 Group's clients have access to a large online repository of more than 7,000 strategic and tactical market analyses. These briefs and reports are available on a wide range of issues and cover thousands of technology companies and their products. In fact, the firm offers perhaps the most extensive base of market intelligence on private technology companies and deals in the industry; however, clients of the Group also have access to the firm's analysts offline – on the phone and in person. This means that clients not only have access to what the firm's analysts *did* write, but clients also have access to the thinking and experience that underlie the insights of the firm's analysts – the analysis they *didn't* write.

## Exploring a Client Relationship with the Firm

To explore a client relationship with The 451 Group's analyst team, contact:

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