

CLOUD COMPUTING

SEGMENT FOCUS: CLOUD ON-RAMPS

Report IV, March 2010

451 MARKET MONITOR

Market Sizing and Forecasts

ABOUT THIS REPORT

The buzz around cloud computing includes an implicit statement around ease of use – that clouds are cheaper and overall easier than the old way of doing things. However, clouds are by no means for the technology faint-hearted, and enough users have demanded tools that simplify/automate the process that a market niche has been created to get users onto clouds.

This report leverages The 451 Group's deep knowledge of and relationships within the cloud computing marketplace, resulting in a proprietary forecast of cloud on-ramp revenue based on a bottom-up analysis of 13 vendors' current revenue and growth expectations. In addition, we provide high-level analysis of the cloud consoles, monitoring and analytics sectors, which, along with on-ramps, make up the management pillar of our cloud taxonomy.

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MARCH 2010

ABOUT THE 451 GROUP

The 451 Group is a technology analyst company. We publish market analysis focused on innovation in enterprise IT, and support our clients through a range of syndicated research and advisory services. Clients of the company — at vendor, investor, service-provider and end-user organizations — rely on 451 insights to do business better.

ABOUT TIER1 RESEARCH

Tier1 Research covers consumer, enterprise and carrier IT services, particularly hosting, colocation, content delivery, Internet services, software-as-a-service and enterprise services. Tier1's focus is on the movement of services to the Internet — what they are, how they are delivered and where they are going.

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ABOUT MARKET MONITOR

The **Market Monitor** product line is a market-sizing research service from The 451 Group and Tier1 Research, offering five-year, bottom-up market size, share and growth forecasts for key segments of the enterprise technology marketplace.

Current Offerings Include:

MARKET MONITOR: VIRTUALIZATION SOFTWARE

100+ vendors in 14 market segments

MARKET MONITOR: CLOUD COMPUTING

200+ vendors in 17 market segments

ABOUT MARKET MONITOR: CLOUD COMPUTING

Market Monitor: Cloud Computing is a quantitative research service from The 451 Group and Tier1 Research that provides a five-year forecast of the size, growth and market share for the rapidly evolving cloud computing marketplace. The Monitor uses a bottom-up approach to track and project revenues for more than 200 vendors operating in 17 segments of the marketplace.

Core Components of the Service:

Market Overview Reports – *Twice-yearly* long-form reports showing overall market size and growth for the 17 segments covered in the service.

Segment Focus Snapshots – Focused monthly insight reports providing more granular detail and market-share data for one or more of the market segments.

Forecasts – Five-year market-size and growth projections for all market segments and companies.

Access to Data – Excel spreadsheets providing data contained within reports.

‘Spot’ Access to Analysts – Unlimited quick inquiry by email or phone to Market Monitor analysts.

In-Depth Access to Analysts – Structured consultation with Market Monitor analysts.

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