

CLOUD COMPUTING

SEGMENT FOCUS: INFRASTRUCTURE AS A SERVICE

Report II, February 2010

451 MARKET MONITOR

Market Sizing and Forecasts

ABOUT THIS REPORT

Infrastructure as a service (IaaS) was the first true cloud offering. The concept of outsourced infrastructure (servers, OS, storage, datacenter space, etc.) delivered via a virtualized environment was well received during the recent recession as established companies and startups alike looked for ways to cut their capex and opex expenses. Amazon Web Services' EC2 launched a movement that has blossomed into a teeming marketplace with over 40 vendors vying for control. While Amazon maintains a lead in terms of market share, the competition (both large vendors and startups) are gunning for their share of the nascent but very promising enterprise marketplace. This report provides an overview of the IaaS marketplace, including key trends, growth drivers and inhibitors, current market size and expected growth for the next five years, as well as vendor market share. As an added feature, we have included the aggregate sizing of the IaaS-attached storage market and the total cloud revenue for the vendors included in this report.

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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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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.

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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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