

VIRTUALIZATION SOFTWARE SEGMENT FOCUS: APPLICATION FABRIC Report VII, May 2010

451 MARKET MONITOR

Market Sizing and Forecasts

ABOUT THIS REPORT

At the highest level, application fabric vendors provide tools that enable an application to function across many independent resources (be they virtual or physical), scale up and down to meet service-level objectives and move workloads between different resources. This last capability offers a way to increase overall application availability, although it does not constitute a full disaster-recovery solution. Application fabric tools provide a framework that allows applications to be set free from the underlying operating system – a crucial capability for effective cloud and virtual environments.

We expect to see pricing pressure in the sector as more vendors bundle these capabilities into broader product offerings. This weighs on our growth expectations for the sector over the coming years. However, the importance of these tools in virtual and cloud environments has been confirmed by recent acquisitions, and we believe there will be more vendors acquired in this sector.

This report examines nine vendors in the application fabric marketplace and provides our assessment of key market value propositions and trends, growth accelerators and inhibitors, aggregate market size and growth rates, and the market share of leading vendors, as well as recommendations for vendors. In addition, we provide an overview of the broader automation landscape, which, along with application fabric, includes automation (the VM lifecycle management, IT process automation and provisioning automation segments), application deployment and test lab automation.

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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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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: VIRTUALIZATION SOFTWARE

Market Monitor: Virtualization Software is a quantitative research service that tracks and forecasts over a five-year horizon the size and growth of the rapidly evolving server and desktop virtualization marketplace. More than six experienced industry analysts contribute to the Monitor, which uses a bottom-up approach to track and project revenues for more than 110 software vendors operating in 14 segments of this market.

Core Components of the Service:

Market Overview Reports – *Twice-yearly* long-form reports showing overall market size and growth for the 14 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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