

WINTERGREEN RESEARCH, INC.

**Worldwide Cloud Computing Market Shares, Strategies,
and Forecasts, 2009 to 2015**

Cloud Makes Computing Easier



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

CLOUD COMPUTING
GOOGLE
GOOGLE APPENGINE
AMAZON WEB SERVICES
RACKSPACEBUSINESS PROCESS MANAGEMENT BPM
BAM
BPMS
Cloud Technology
Blogging
Web 2.0 Design Patterns
Wiki-Style Collaboration
Social Networking
Business Process Management

Web Assets

WEB SERVICES
SOA
VIRTUALIZATION
SERVER HOSTING CENTERS
WEB PROPERTIES
Business Intelligence
Business Mode
Business Process
Cloud computing Interoperability
Cloudforce
Collaboration
Mashups
Slesforce.com
Web services
Web Analytics / Frameworks

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OPPORTUNITY ABOUNDS

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**Worldwide Cloud Computing Market Shares, Market
Strategies, and Market Forecasts,
2009-2015**

LEXINGTON, Massachusetts (July 24, 2009) – WinterGreen Research announces that it has a new study on Worldwide Cloud Computing. The 2009 study has 712 pages, 211 Tables and Figures. Worldwide markets are poised to achieve significant growth as search engines use efficient automated process to drive new advertising and communications capabilities. Applications can be built without programming.

The cost of the study is \$3,400 for a single copy, \$6,800 for a web site posting. Systems are poised for significant growth as Web based applications are used to implement automated process. A cloud computing system has many aspects related to a range of industries moving to leverage the Internet as a channel. The information available on the cloud is anticipated to increase substantially by 2015.

The markets are anticipated to expand to provide broader reach of information and productivity improvements for the enterprise. Worldwide cloud computing is poised to achieve significant growth as enterprise software offered by vendors provides competitive advantage to users because the cost of improving search engine functionality is spread across the broad base of users. The markets are expanding in response to the need to provide core productivity improvements for personal and business innovation. People get better computing services paid for by advertising because 3 billion users is a very attractive audience.

A move towards cloud computing signals a fundamental shift in how information is handled. The prospect of digitizing much of the world's information and making it searchable poses the prospect of a quantum increase in the quantity of information available; an increase by a factor of 1,000. At the most basic level, cloud computing on this scale contemplated represents utility computing.

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Google has long envisioned and prepared for this change in the scale of the quantity of information to be managed. For clouds to reach their potential, they need to be as easy to program as it is to navigate the Web. This new programming paradigm opens up growing markets for cloud search and software tools. Google and a host of other companies offer application development without programming capabilities to users.

Typically, Google likes to start with free. Power users bear some of the costs. Google is perhaps reaching the limits of the current hardware architecture with a need to rethink the energy and server configurations. The mainframe can operate at 10 times savings over distributed systems in most cases and represents a replacement cloud based hardware configuration that is more efficient because of its shared workload capabilities. This is significant on the scale of cloud computing that Google contemplates.

Developers can operate an application-testing infrastructure in the cloud. This is saving time and money compared to traditional test scenarios. Testing more extensively and enabling faster handoff from development to operations is achieved. Users get a transparent view of application performance, reliability and scalability. Extensive testing can be done before going into production. Users can test multiple architectures, variables, components, and configurations easily and independently. To proceed to deploy in the cloud, developers can push the debugged test environment live in a few simple steps.

Cloud computing is being expressed as search engine software and Software as a service (SaaS). ERP, CRM and e-commerce companies participate in the market. Application development is being used in cloud computing to permit changes to code, using a syntax in place of a programming language, making systems more flexible. Automated process that is rigid is not supportive of competitive advantage. SOA Web services are being used in cloud computing systems to permit flexible response to changing market conditions. Virtualization is another aspect of cloud computing driving markets.

Salesforce.com with 78% market share and NetSuite with 13% share are the providers of CRM cloud based computing. CRM software as a service cloud computing is implemented by salesforce.com in the context of providing application development so that systems are flexible and customers can have customized code.

Real time analysis of information is being used to position companies to achieve competitive advantage. Cloud computing is a central aspect of the BPM initiative, providing up to date information in a usable format. Companies are implementing BPM solutions in the context of cloud computing that provides syntax to business users.

BPM, linking, calculation, SOA API integration, and Web page launch syntax are used in a model driven architecture at the line of business to develop applications in the cloud. The engine comes from a central code base that is worked on all year long by IT and shared with users via syntax. The syntax is available online. SOA components are used as part of the applications syntax. In this way, business analysts have access to BPM models that run without coding. Scalability and enterprise wide solution sets are achieving significant competitive advantage and improvements in productivity. Response to competition means adjusting unique enterprise resources to address opportunities and respond to change in markets. Needs and demands are integral to an integration infrastructure systems implementation.

According to Susan Eustis, lead author of the study, “innovation drives cloud computing market growth in every industry, and innovation depends on implementation of automated business process in every instance. Google, Yahoo, Salesforce.com, IBM, Hewlett Packard, Oracle, and Microsoft are among cloud computing market leaders. Cloud computing represents a way to give small and mid size business a market presence similar to that of a globally integrated enterprise.”

IBM is able to leverage its SOA market dominance to support innovation, providing software that supports flexible response to changing market conditions. SOA reaches into every industry and every segment of the economy via cloud computing. SOA drives innovation for the very large enterprises. Mid range size companies and very small organizations are adopting technologies similar to what the enterprise use, creating automated process to replace manual process.

Cloud computing markets at \$36 billion in 2008 are expected to reach \$160.2 billion by 2015. Advertising drives cloud computing. The markets are comprised of search engines, communications technology, application development without programming, and CRN automation of process.

Companies Profiled

Market Leaders

Google
Yahoo!
IBM
Oracle / Sun
Amazon
Hewlett Packard (HP)
Oracle / Sun
Progress Software
Salesforce.com
ebay
Microsoft Corporation
NetSuite

Market Participants

Selected Cloud Computing Company Profiles

IBM EMC
3Tera Adobe
AT&T Cisco
CloudRamp CloudWorks
Dell Skype
CloudScale Networks
eBay PayPal
Enomaly
Eucalyptus
Fujitsu
Red Hat JBoss
Research In Motion (RIM)
SAP CRM
Serve Path / Go Grid
RackSpace RightScale
Trend Micro Zeus Technology, Ltd.

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REPORT METHODOLOGY

THIS IS THE 411TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. 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. 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. 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 2008. WITH 2008 AND SEVERAL YEARS PRIOR TO THAT AS A BASELINE, MARKET PROJECTIONS WERE DEVELOPED FOR 2009 THROUGH 2015. THESE PROJECTIONS ARE BASED ON A COMBINATION OF A CONSENSUS AMONG THE PRIMARY CONTACTS 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.

YOU MUST HAVE THIS STUDY

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Worldwide Cloud Computing Market Opportunities, Strategies, and Forecasts, 2009 to 2015

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ABOUT THE COMPANY

WINTERGREEN RESEARCH, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

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ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE SERVICES ORIENTED ARCHITECTURE SOA, MID IR SENSORS, CONTENT MANAGEMENT, MID SIZE BUSINESS MIDDLEWARE, WORLDWIDE ENERGY MARKETS, SOLAR UTILITY MARKETS, SOLAR TECHNOLOGY MARKETS, THIN FILM BATTERY MARKETS, WEBCAM MARKETS, REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, NANOTECHNOLOGY, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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