

WINTERGREEN RESEARCH, INC.

**Worldwide Cloud Computing Market Opportunities and
Segment Forecasts, 2009 to 2015**

Cloud Computing Impacts Every Industry



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

REPORT # SH24131315 519 PAGES 112 TABLES AND FIGURES 2009
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CHECK OUT THESE KEY TOPICS

**CLOUD COMPUTING
ENERGY SMART GRID CLOUD
COMMUNICATIONS CLOUD
TELEMEDICINE
BANKING FINANCE AND INSURANCE CLOUD
EDUCATIONAL WEB SERVICES
Scalable Symmetric Multiprocessors
Cloud Technology**

Web Services

**WEB SERVICES ORIENTED ARCHITECTURE
SOA
VIRTUALIZATION
SERVER HOSTING CENTERS
WEB PROPERTIES
Business Intelligence
Business Model
Business Process
Cloud Computing Interoperability
Cloud Force
Collaboration
Mashups
Salesforce.com
Web Services Apps
Web Analytics / Frameworks**

OPPORTUNITY ABOUNDS

**WinterGreen Research, Inc.
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Worldwide Cloud Computing Market Opportunities and Industry Segment Forecasts, 2009-2015

LEXINGTON, Massachusetts (August 12, 2009) – WinterGreen Research announces that it has a new study on Worldwide Cloud Computing market opportunities. The 2009 study has 519 pages, 112 Tables and Figures. Worldwide cloud computing markets are poised to achieve significant growth. Cloud computing market opportunities are different in every industry as software becomes less expensive to buy and operate. The markets start to expand to provide productivity improvements.

According to Susan Eustis, lead author of the study, “Cloud computing changes software forever. Software is offered to users as a service from the cloud. Innovation is what drives market growth in every industry. IBM, Google, Amazon, Microsoft, and the major SOA vendors are poised to leverage cloud computing to support innovation. Cloud computing is providing software that supports flexible response to changing market conditions.”

Cloud computing changes SOA, facilitating reach into every industry and every segment of the economy. SOA drives innovation for the very large enterprises, now the 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 is set to bring major change to the software business. Cloud computing is used to implement utility automated process. The complexities of the development platform are invisible to developers. Programs run on the cloud platform in a manner that is more cost efficient than with distributed server platforms.

Application development is achieved using point and click systems that do not involve programming for the line of business analyst. Syntax is exposed to analysts and developers in a manner that permits collaborative application development. The cloud computing engine hides the complexity of deep if statement logic, replacing that with drop down boxes that permit iterative presentation of metrics that are then managed using a calculation matrix. Systems imitate spreadsheet applications development, but with the richer presentation logic available on Web pages. Web services provide the base for cloud computing initiatives.

Automated process will expand in every industry in this manner, permitting people to build automated processes from SOA components the way they now use the alphabet to build books.

SOA components become the syntax, the alphabet of computing in cloud environments. IT engines run in the cloud exposing the syntax to users. The vendors with the most reliable systems will win in the market as reliability takes a paramount position in the cloud.

Cloud computing is an emerging computing model. Users can gain access to their applications from anywhere, through any connected device. Information is available over the network. A user-centric interface makes the cloud infrastructure supporting the applications transparent to users.

High energy cost and low utilization rates are a central issue with distributed systems. Mainframe class computing provide low energy costs, low labor costs, and high reliability needed for cloud computing. Software developers lose a massive amount of time and productivity getting permissions and access to the systems and tools they need to do their jobs. Hewlett Packard and IBM have built systems to safely enable developers to serve themselves. This can help reduce IT labor costs by 50 percent, reduce provision cycle times from weeks to minutes and improve quality, eliminating software defects by up to 30 percent.

Cloud computing markets at \$36 billion 2008 are expected to reach \$160.2 billion by 2015. Market growth is fueled by ease of information access provided by the cloud. Faster development systems are available to line of business analysts through point and click application development tools. Industry specific applications are evolving in the context of the ability to build applications from SOA components.

Companies Profiled

Market Leaders

IBM
Hewlett Packard (HP)

Market Participants

Selected Cloud Computing Company Profiles

Oracle / Sun
Progress Software
Salesforce.com
ebay
Microsoft Corporation
NetSuite
Amazon
Google
Yahoo!
EMC
Attachmate
3Tera
Adobe
AT&T
Cisco
CloudRamp
CloudWorks
Dell
Skype
Clerity
CloudScale Networks
eBay PayPal
Enomaly
Eucalyptus

**Fujitsu
Tibco
Hostbridge
Red Hat JBoss
Research In Motion (RIM)
SAP CRM
Sirius
Serve Path / Go Grid
RackSpace
RightScale
Trend Micro
Zeus Technology, Ltd.**

Worldwide Cloud Computing Market Opportunities and Industry Segment Forecasts, 2009-2015

REPORT METHODOLOGY

THIS IS THE 413TH 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 and Segment Forecasts, 2009 to 2015

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