

**EXECUTIVE OVERVIEW**

CLOUD INFRASTRUCTURE SERVICES II:  
HERE COME THE HEAVYWEIGHTS

**CLOUDSCAPE**



OCTOBER 2009

# REPORT SNAPSHOT

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## ABOUT THIS REPORT

This is the second in a series of cloud infrastructure reports for 2009, that contrasts the leaders of the Cloud Infrastructure as a Service (IaaS) and Platform as a Service (PaaS) sectors. Profiles include Amazon's Web Services, Google AppEngine, Windows Azure, Force.com and Rackspace. The report describes the direction these cloud service providers are taking as they expand beyond rudimentary infrastructure as a service plays and infringe on the traditional dedicated and managed services market. The consumer of these cloud services has changed from a year ago – public clouds are no longer being addressed solely to ISVs and developers. Instead, modern clouds are tailored to the needs of the enterprise market, the federal sector and other highly regulated and compliance-seeking industries. This report showcases some of the concerns of these users, and how some of the cloud leaders have evolved their offerings to attract serious enterprise users to their platforms. This includes insight into the new APIs, features and innovations coming into the market that are alleviating fears of the cloud and proving of greater value than traditional services.

We also identify the growth sectors driving the cloud and use them to calculate the true size of the current and future cloud infrastructure services market. Much of the current confusion resulting from the meaningless market size numbers that have been thrown around in the industry is from placing revenue from both applications and underlying technologies in one giant bucket. T1R has carefully extracted just the pure-play cloud market size numbers. This report will discuss the difference between those providers that are fostering public and commodity cloud solutions and those that are creating more complex private cloud environments. The market is further differentiated between those that are self-described IaaS providers catering to the do-it-yourself developer community from those that are taking additional steps to offer a variety of automated and managed services that layer on top of that infrastructure. Finally, the report shines a light in the direction that the cloud market is taking as interoperability, desktop virtualization and hybrid solutions become hot topics.

## ABOUT CLOUDSCAPE

CloudScape, the new interdisciplinary research and advisory program from The 451 Group and Tier1 Research, provides detailed insight, advice and analysis targeting cloud practitioners.

CloudScape draws on the unique expertise of The 451 Group, with its 10-year history of in-depth analysis of grid, utility and cloud computing, and Tier1 Research, the leading analyst company covering hosting, Internet infrastructure and IT services.

Insight is delivered via daily commentary, long-format reports, analyst advisory services, events and webinars.

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