The Future of Virtualization: Emerging Trends and the Evolving Vendor Landscape

Description: The Future of Virtualization report examines one of the biggest trends in recent IT history: virtualization. The promise of virtualization technology – whether applied to the server, storage, client/desktop, application or network – is to increase capacity, utilize resources more effectively and reduce costs. It also fits neatly with many organizations' green IT strategies, with its promise to increase utilization of existing assets and eliminate the demand for more energy-guzzling hardware resources. Virtualization is not only a hot topic but also a rapidly evolving area of the IT sector. Despite a tough macroeconomic climate, there is evidence that organizations are willing to invest in virtualization technologies, making it of great interest to incumbent vendors and those eyeing up the future market opportunity.

This report is of interest to any supplier of IT products and services, whether selling direct or through a channel of resellers. This group includes virtualization vendors, hardware vendors, software vendors, open source specialists, system management providers, service providers, data centres, internet-based businesses such as Amazon offering in-cloud applications, value-added resellers and managed network service providers.

Key features of this report

- Insight into the virtualization market opportunity – for example, desktop and application virtualization represent the next growth opportunities, now the server and storage virtualization markets are established
- Market forecasts and cost saving breakdowns
- Analysis of the vendor landscape and exploration of the potential challenges / opportunities ahead for the main players
- Recommended vendor actions
- Case studies of virtualization in action

Scope of this report

- Identify market drivers and future industry 'sweet spots'
- Refine sales and marketing campaigns to educate end users about the benefits of virtualization and allay any concerns they may have with the technology
- In-depth analysis of emerging trends in the virtualization market
- Identify the main players in the virtualization market
- See evidence of virtualization in action through real-life case studies
- Identify new market opportunities (e.g. SMBs)

Key market issues

Virtualization is an old technology brought into the 21st-century: Virtualization has been available on the mainframe since the 1960s. The current resurgence in virtualization is brought about by the fact that today's hardware provides significantly more horsepower than is needed by the applications that it runs, so CPU utilization rates are at an all-time low.

Virtualization doesn't just improve operational efficiencies: Many organizations initially adopt IT virtualization in order to save costs through server consolidation, but then realise that other benefits are possible when operating with a virtualized infrastructure, and so IT virtualization then becomes a strategic part of the overall IT plan.

Desktop and application streaming will become key components in the way most IT service providers deliver virtual desktops and applications to end users. The technology is not fully mature or robust, however, and service providers and customers shouldn't expect widespread use before 2010.

Network virtualization: The I/O throughput of virtualized systems is one aspect of IT virtualization that will improve significantly over the next two years, as software products gain assistance from developments at
the chip and server bus level.
Cloud computing: It’s early days for the delivery of ‘Desktop as a Service’ from the public cloud, but already Tier 1 IT services vendors are anticipating interest from large enterprises and looking at ways they can integrate cloud-based services (both public and private) into their own managed services offerings.

Competitive landscape: VMware is the most successful vendor in the enterprise server virtualization market today. VMware - like its rivals – is building the management tools that are needed to handle virtual servers. Its message in more recent years has been about cloud computing. Microsoft, however, represents a considerable threat: its IT virtualization strategy is starting to come together and the company now holds a strong enough hand to be considered a player in the game.

Key findings of this report

Virtualization has significant cost benefits for organizations: server consolidation can yield a saving of £2 million over three years for an organization running 250 dual-core servers; and a power saving in the order of £78,000 per 1,000 PCs per year can be realized by moving from a full desktop PCs infrastructure to a server-hosted desktop virtualization solution.

The market for virtualization management solutions will be the most innovative and, potentially, lucrative in the near future.

Financial analysts estimate the market for IT virtualization could be worth over $19 billion.

As many as 16 million desktops could be virtualized by 2011.

The virtualization infrastructure management (VIM) market is undoubtedly going to be the most lucrative aspect of IT virtualization in the longer term, and so is perhaps the most dynamic and active part of the virtualization scene.

Demand for some inclusion of cloud services or proof-of-concept will be a part of 10 per cent to 15 per cent of enterprise requests for desktop services by 2012.

Key questions answered

- What's driving demand for virtualization within organizations?
- What are the barriers to widespread take-up?
- Which are the fastest growing segments of the virtualization market?
- Which are the largest?
- Who are the leading vendors? Which vendor represents the biggest competitive threat?
- How will the market for virtualization develop in the future?
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