TOP 10
PROJECTS AND
TOP RESEARCHED
PROJECTS

TOP 10
EMERGING
VIRTUALIZATION
COMPANIES

Market Intelligence Report 2014

TechTarget

Top 10 Projects and Top Researched Projects

2014 IS A BUSY YEAR IN IT. The effects of the recession are being worked through, and organizations find themselves prioritizing projects and embracing newer computing approaches such as cloud computing, virtualization and mobility. Growth in requirements for business-focused applications, such as business intelligence and big data, adds urgency to data center projects seeking to enhance performance and throughput without adding undue costs. Hardware and software vendors are answering the call with internal infrastructure enhancements such as solid-state storage (solid-state drive) and external options such as Software as a Service (SaaS) versions of their flagship products that obviate the need for direct infrastructure improvement.

IT decision makers now find themselves at the uncomfortable confluence of more projects, shorter implementation time frames and accelerating business needs as IT grows from a back-office services organization to the core competitive differentiator in many business plans. TechTarget Market Intelligence offers this guide to the top projects in IT—both the most popular for implementation in 2014 and the top researched projects of the year—that IT decision makers are keenly interested in, but may not be ready to purchase and implement right away.

THE STATE OF SERVER VIRTUALIZATION IN 2014

Server virtualization—using software, usually called a hypervisor, to divide one physical server into multiple isolated virtual environments—has been one of the most popular and impactful developments in computing this millennium. In repeated TechTarget research, two-thirds of enterprise CIOs rank server virtualization as the most significant change that they have made to their infrastructure.

In 2014, VMware continues its dominance in the server virtualization space, commanding more than 70% market share in recent surveys. VMware is most popular in large virtual-

TOP IT PROJECTS
- Server virtualization
- DR/BRC
- Net-based security
- Net management/ monitoring
- Smartphones
- Backup for virtual servers
- BI/analytics/data warehouse
- Tablet PCs
- Data center consolidation
- Data loss prevention

TOP RESEARCHED PROJECTS
- Mobility/MDM
- Private/hybrid cloud computing
- Big data/storage for big data
- IaaS
- Cloud storage/ cloud backup
- Desktop virtualization
- Solid-state storage
- Software-defined networking

ization environments—those in organizations with more than 1,000 employees. Micro-soft, with its much-improved Hyper-V server virtualization software, is gaining popularity in small and medium-sized organizations, some 15% of which are currently employing the hypervisor. Larger organizations are also considering Microsoft Hyper-V, but many are already deeply invested in the VMware platform, making switching or adding another platform difficult. Organizations of all sizes are drawn to Hyper-V's attractive pricing and integration with Windows Server 2012 and Microsoft Azure—Microsoft's public and private cloud offering.

Most Significant Changes to Infrastructures
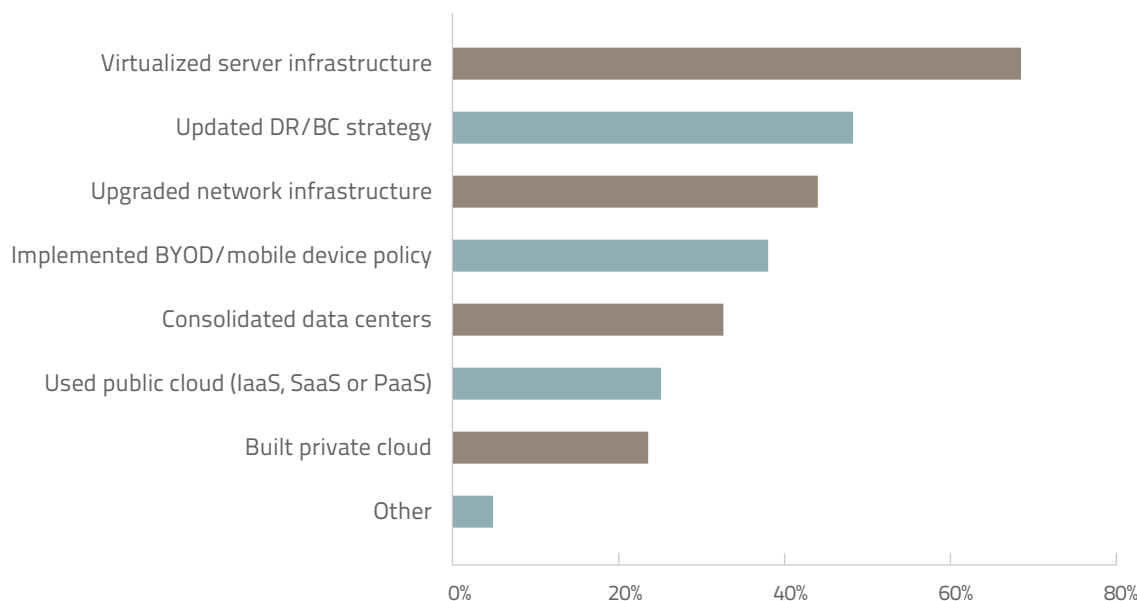
SOURCE: TECHTARGET 2013 CIO TECH TRENDS & RESEARCH PREFERENCE SURVEY; RESPONDENTS COULD CHECK ALL THAT APPLY.

**FAST FACTS:
VIRTUALIZATION
AT SMALLER FIRMS**
(fewer than 100 seats)

50
Percentage that have more than 50% of their servers virtualized

58
Percentage that intend to have more than 50% virtualized in 2014

1 in 4
Odds that the virtualization hypervisor being deployed will be from Microsoft

3 in 10
Odds that I/O bottlenecks are causing problems with virtualization

Regardless of the hypervisor employed, virtualization delivers excellent return on investment due to its ability to enable workload consolidation. This results in higher utilization of existing server infrastructure and has the net effect of reducing hardware expenditures. This benefit is not without costs, however. Server virtualization administrators report a number of unintended consequences resulting from consolidating workloads. Principle problems reported include I/O bottlenecks, server performance issues, backup challenges and network performance issues. Organizations are still deploying virtualization in earnest, so don't fret if your organization doesn't yet have at least half of its physical servers running virtualization software. ■

Greatest Virtualization-Related Challenges
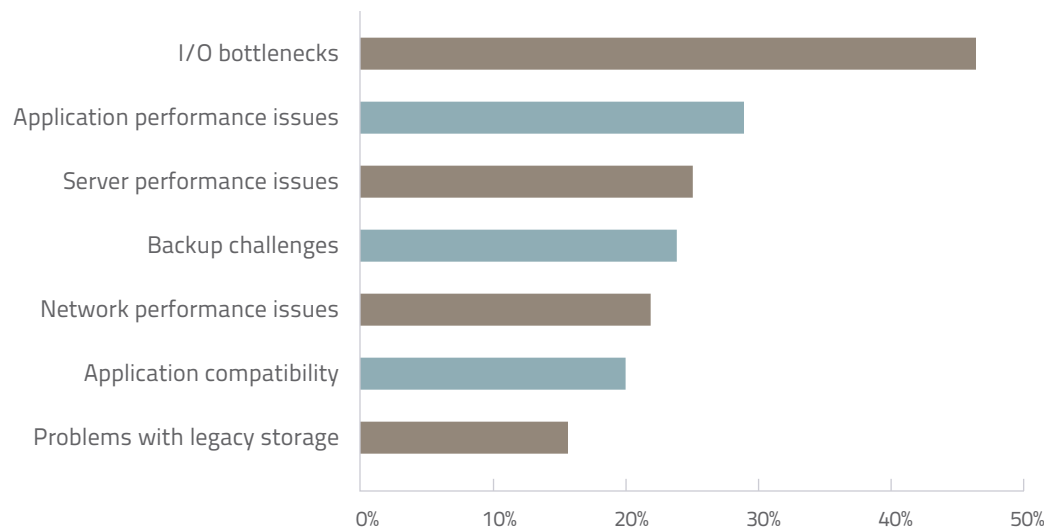
SOURCE: TECHTARGET 2013 CIO TECH TRENDS & RESEARCH PREFERENCE SURVEY; RESPONDENTS COULD CHECK ALL THAT APPLY.

FAST FACTS:
**VIRTUALIZATION
AT LARGER FIRMS**
(more than 1,000 seats)

47
Percentage that
have more than
50% of their servers
virtualized

62
Percentage that
intend to have more
than 50% virtualized
in 2014

1 in 11
Odds that the
virtualization
hypervisor being
deployed will be
from Microsoft

1 in 2
Odds that I/O
bottlenecks are
causing problems
with virtualization

Top 10 Emerging Virtualization Companies Poised to Disrupt the Market

THE VIRTUALIZATION MARKET is hotter than ever, with new companies popping up to fill every software-defined niche imaginable. But with all those virtualization companies competing for your attention, it can be hard to keep up with who is really standing out and providing valuable products—and not just nice ideas.

Here's our list of the top 10 virtualization companies to watch in 2014 that are emerging as major players in the virtualization market. Some of these companies are startups with a unique idea on the cutting edge. Others have been around for a while or already offer mature products. The one thing these companies all have in common is that they're poised for a successful year and are ready to bring new, innovative technologies to market to help solve some of the virtual data center's nagging problems.

CLOUDPHYSICS' INFRASTRUCTURE ANALYTICS DEFINES A NEW CATEGORY

Even without a generally available product to showcase, CloudPhysics Inc. caught many eyes at VMworld 2012. In 2013, IT pros flocked to the CloudPhysics booth to preview the product generating all the fuss. The appeal of CloudPhysics' big data approach to infrastructure analytics lies not just in how it can provide unique vision to an environment or identify potential configuration problems, but how the company envisions using all that data on a macro scale. The idea of collective intelligence, as CloudPhysics calls it, promises to build new insight by comparing operational patterns across hundreds of companies and puts CloudPhysics in a category of its own.

DELPHIX DATABASE VIRTUALIZATION DOES IT BETTER

Delphix Corp. was started in 2008 by the founder of Avamar Technologies (which was later acquired by EMC). The company is growing fast, offering a unique approach in the emerging

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big data market. Instead of working on live data sets, Delphix provides the ability to auto-mate the process of creating a virtual instance of the database. Users or developers can then access or perform analytics on those virtual databases to avoid performance hits that might result from working on live data. The Delphix database virtualization approach could also reduce the need for additional hardware to support multiple copies of the data.

HOTLINK SUPERVISOR FOLLOWS MULTIHYPERVISOR MANAGER TREND INTO DATA CENTERS

As more businesses begin to bring a second, or even a third, hypervisor into their data centers, the demand for a tool to manage those heterogeneous environments is growing. That's the wave HotLink Corp. is riding, and it's making quite a splash. HotLink SuperVISOR allows administrators to deploy, manage and migrate Hyper-V, KVM or Xen virtual ma-chines (VMs) from within VMware vCenter.

INFINIO ACCELERATES STORAGE PERFORMANCE

Storage performance has been a traditional bottleneck in virtual environments, with more VMs accessing the same storage hardware. Rather than adding more storage hardware to handle increased I/O loads, Infinio Systems Inc. takes a software approach to the problem. Infinio Accelerator virtual appliances reserve a portion of hosts' CPU and RAM to use as a caching and acceleration layer so that recently accessed storage blocks, such as operation system files, can be shared among VMs. This reduces the need for each VM to access the network-attached storage, improving performance without additional hardware.

INTIGUA APPLIES VIRTUALIZATION TO MANAGEMENT TOOLS

Intigua has been recognized by our Best of VMworld judges two years in a row, first for its Intigua System Management Virtualization in 2012 and then for its Virtual Containers in 2013. Intigua's software extends the concept of virtualization to management tools by ab-stracting and containerizing the management stack—including both the agents resident on servers and the policies within the management tools. This allows users to automati-

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cally deploy and upgrade their management stack, monitor health and throttle resource consumption.

NEVERFAIL SOFTWARE IMPROVES DATA CENTER DOWNTIME PREVENTION

Neverfail Ltd. may be the most established vendor on our list, offering a variety of products and services, including Disaster Recovery as a Service. However, Neverfail's newest offering, IT Continuity Architect, helped land it a spot in the top 10. IT Continuity Architect automatically analyzes IT infrastructure, maps dependencies and checks configuration against service-level agreements to identify potential problems before they lead to downtime. Our Best of VMworld judges chose IT Continuity Architect among a diverse field of competitors as the winner in this year's New Technology category.

NUTANIX STORAGE OFFERS "CLOUD IN A BOX" APPROACH TO CONVERGED IT

The "cloud in a box" approach Nutanix Inc. uses in its NX-6000 Virtual Computing Platform impressed many analysts—and our Best of VMworld judges —with its simplicity and flexibility. In fact, this is the third year in a row that our judges have recognized the company for its innovative converged IT infrastructure products. Nutanix's storage products take a hyper-converged approach, bundling storage nodes with servers, networking and built-in hypervisors, eliminating the need for a separate storage network.

PLUMGRID STANDS OUT IN A FIELD OF
SOFTWARE-DEFINED NETWORKING PRODUCTS

Software-defined networking is one of the hottest segments of the market, with big names (VMware and Oracle) gobbling up promising startups such as Nicira and Xsigo. There are a number of encouraging startups still out there, but the one that got the most attention from our Best of VMworld award judges was PLUMgrid Inc. Unlike many network virtualization vendors, PLUMgrid does not rely on a central controller. Instead, the company's approach relies on its PLUMgrid Director, which coordinates and manages platform functions.

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PROXIMAL DATA OUTPACING VMWARE'S VFRC WITH AUTOCACHE

VMware brought the advantages of local solid-state drive (SSD) caching to the forefront with its release of vSphere Flash Reach Cache (vFRC), but it's certainly not a new concept. Proximal Data Inc. offers its own version of host-based caching with AutoCache, which in many ways is a step up from vFRC. In fact, one analyst said AutoCache makes VMware's vFRC look terrible in comparison. In addition to being easier to use, AutoCache supports both VMware and Hyper-V. As SSD prices drop and more flash storage makes its way into servers, administrators will want to take advantage of the hardware.

SIMPLIVITY OMNICUBE RAKES IN AWARDS

Started in 2009, SimpliVity Corp. has been on a roll recently, collecting both awards and funding. In August, SimpliVity OmniCube stood out to our Best of VMworld judges in the Storage and Backup category, the largest and most competitive category of the competition. Then, earlier this month, a different set of judges named OmniCube the winner of the Modern Infrastructure Impact Award as the best converged infrastructure product. ■

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