

Complex Managed Hosting: Market Survey and Vendor Feature Comparison

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Complex Managed Hosting: Market Survey and Vendor Feature Comparison

By Mike Stevens

There was a time when managed hosting meant little more than renting out servers in a remote data center. In its most basic form, collocation, the vendor provided nothing more than power, cooling and physical cable connections. Although collocation is still a viable service and business model, managed hosting has evolved far beyond its humble beginnings. In its most sophisticated form, *complex managed hosting*, companies can outsource high-level IT functions such as OS management, virtualization, load balancing, performance monitoring (CPU, network and memory utilization), security and more. Some of the vendors that offer complex managed hosting can support multiple hardware and software environments, and even legacy applications.

However, some vendors that claim to be in the complex hosting market can provide only a small subset of these functions. As result of the disparities in technical know-how and experience, there is currently some confusion in the market as to exactly what *complex managed hosting* means, and what customers can and should expect from a potential vendor.

We explored this issue from two different perspectives. First, we enlisted the help of Palmer Research to survey our readership so we could learn what features were important to companies that were already involved with complex managed hosting or that were planning to become involved within the next year. User evaluations of what's important and what's not are a good tool in predicting the direction an evolving market will take. Second, we compared the offerings of three major vendors in the market—Connectria, Rackspace and IBM—to get a sense of what features sophisticated vendors are offering right now. This product comparison focused on features and capabilities specifically relevant to complex managed hosting, as opposed to general managed hosting services. Information about the capabilities of individual vendors was collected from product descriptions, service definitions and other resources available to the public on the vendors' websites. Though all product and service information in this report was accurate at the time it was collected, some specific offerings of individual vendors could have changed since then.

The Survey

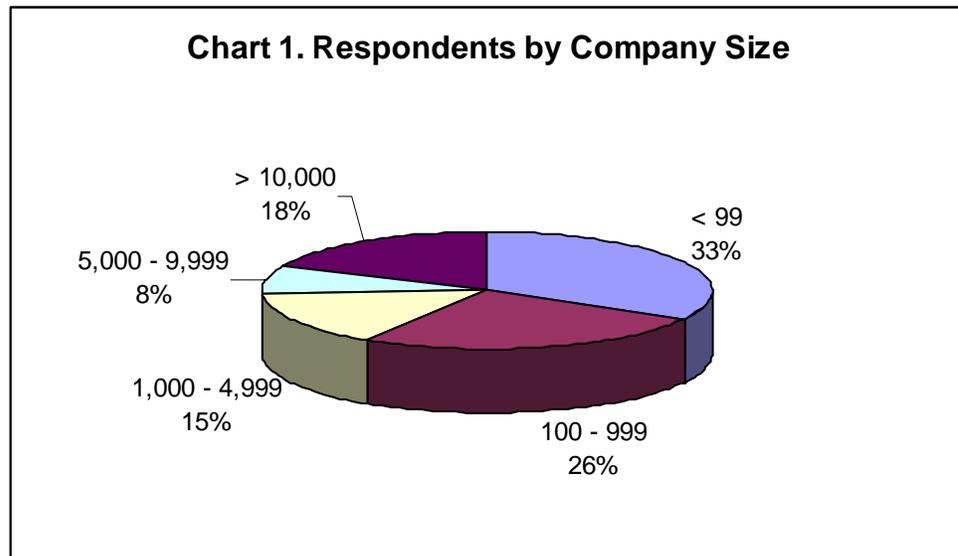
The IT Business Edge Complex Managed Hosting Survey was conducted April 1 to 2, 2010. The survey was designed by Palmer Research, in collaboration with the author and IT Business Edge.

For the purposes of the survey, *complex managed hosting* was defined as having four characteristics that are not available in a conventional managed hosting environment:

- Complex, enterprise-class technologies such as Unix, the IBM iSeries or Oracle RAC
- Heterogeneous technology environments

- Support from the provider that extends beyond basic hardware management to include functions such as OS maintenance or database administration (DBA)
- High levels of customization and custom service-level agreements (SLAs)

There were 877 respondents in all, representing a very diverse sample. As indicated by Chart 1, respondent company size ranged from fewer than 99 employees to over 10,000, and no one group was dominant. Twenty-three percent had experience with complex hosting, 36 percent had experience with conventional managed hosting and 41 percent had no experience with either.



Broadly speaking, the survey confirmed that complex managed hosting is a well-established and growing market, with two thirds of the participants either planning to use complex managed hosting in the next 12 months or considering it in the future.

As might be expected, respondents with larger budgets for hosting in general had more experience with complex managed hosting. At the \$100,000+ per month budget level, 28 percent indicated they had complex managed hosting experience. For those with budgets of under \$10,000, the figure was only 7 percent.

The reason for this correlation is quite simple: larger companies tend to have larger IT budgets, and they also tend to have more complex IT environments. The implication is that, at least for the near future, the complex managed hosting market will consist primarily of large and upper-end mid-sized companies and organizations. These companies will continue to drive market offerings that promise value far beyond the basic “care and feeding” of servers, although those basic services will continue to be important.

On the whole, survey participants cast their strongest votes for reliability, performance and the technical expertise to get things back up and running, whether in the case of an everyday problem or a catastrophe. At the same time,

they exhibited a wide variety of needs. To understand how the market is responding to these varying needs, we examined the offerings of three companies: Connectria, Rackspace and IBM.

Vendor Comparison

For the purpose of comparison, companies were ranked on eight categories: data center basics, security, breadth of hardware and software supported, backup practices, sophistication of managed hosting capabilities, flexibility in business practices, sales and support team structure, and pricing. Star ratings were calculated to provide a sense of how the vendors compare on the basis of whether they offer a particular item. The actual item count for each area was mathematically converted to a five-point scale, with half a point given for items offered on an optional basis or with some other qualification. A summary of the vendor scores is provided below, with more detailed analysis provided next.

| | Connectria | Rackspace | IBM |
|---------------------|------------|-----------|-----------|
| Data Center Basics | ★★★★ 4.0 | ★★★★½ 4.5 | ★★★★★ 5.0 |
| Security | ★★★★★ 5.0 | ★★★★½ 3.1 | ★★★★½ 4.5 |
| Hardware/Software | ★★★★★ 5.0 | ★★½ 2.2 | ★★½ 2.3 |
| Backup | ★★★★★ 5.0 | ★★★★ 4.0 | ★★★★ 4.0 |
| Managed Hosting | ★★★★½ 4.6 | ★★★★½ 4.3 | ★★★★½ 4.5 |
| Flexibility | ★★★★★ 5.0 | ★★★★½ 3.8 | ★★½ 2.5 |
| Sales/Support | ★★★★ 4.0 | ★★★★ 4.0 | ★★½ 2.5 |
| Pricing Flexibility | ★★★★★ 5.0 | ★★★★½ 4.5 | ★★★★½ 4.5 |

Corporate and Data Center Basics

Connectria, founded in 1998 and headquartered in St. Louis, Missouri, has had a strong corporate focus on complex managed hosting since its founding, although it also offers conventional managed hosting. The company has approximately 80 employees and operates data centers in St. Louis, Missouri (2) and Philadelphia, Pennsylvania (1).

Rackspace, founded in 1998 and based in San Antonio, Texas, provides a variety of managed and complex managed hosting services, as well as branded e-mail. Rackspace has approximately 2,600 employees and operates 9 data centers: 6 in the continental U.S., 2 in the UK and 1 in Hong Kong.

IBM, founded in 1896 (as the Tabulating Machine Company) and headquartered in Armonk, New York, operates roughly 175 data centers in 18 countries and has just under 400,000 employees worldwide. The company has been involved in managed

hosting since 1995 through its Global Services Division, which has roughly 3,000 employees.

What is striking in comparing these three service providers of very different sizes, histories and corporate cultures is how well all of them measure up in parameter after parameter. Only a few parameters within the comparison that follows would strongly lead potential customers to one provider or another for complex managed hosting, based on specific customer needs.

For example, companies looking for support of an infrastructure containing IBM components would have to eliminate Rackspace from their short list, and IBM would be the only viable choice for companies requiring a physical data center presence in multiple geographical regions outside the continental U.S. Among the three, Connectria is uniquely capable of providing *upstack support* in some areas, and its focus on complexity would likely make it the number-one choice when multivendor environments were involved. In general, however, all three appear to have what it takes to make a complex managed hosting initiative successful for their customers—at least on the surface. For this reason, the details of specific quotes and the willingness of the provider to adjust to specific needs become very important.

DATA CENTER BASICS

| Connectria | Rackspace | IBM |
|------------|-----------|-----------|
| ★★★★ 4.0 | ★★★★★ 4.5 | ★★★★★ 5.0 |

The first area of comparison is data center basics: physical security, power and general quality of operations. All three companies compare favorably in all these categories, although IBM obviously has an edge in global presence.

| DATA CENTER BASICS | Connectria | Rackspace | IBM |
|----------------------------------|---|---|---|
| Physical Security | <ul style="list-style-type: none"> ● 24/7 surveillance ● Biometric access control | <ul style="list-style-type: none"> ● 24/7 surveillance ● Biometric access control | <ul style="list-style-type: none"> ● 24/7 surveillance ● Biometric access control |
| Redundant Power Sources | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes |
| Generator + Backup | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes |
| SAS 70 Type II Certified | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes |
| Presence Beyond Continental U.S. | <ul style="list-style-type: none"> ● No | <ul style="list-style-type: none"> ● Limited | <ul style="list-style-type: none"> ● Yes |

SECURITY

| Connectria | Rackspace | IBM |
|------------|-----------|-----------|
| ★★★★★ 5.0 | ★★★★ 3.1 | ★★★★☆ 4.5 |

All three companies also do well in the area of logical security, with firewalls, protection against various types of malware and attacks, as well as virtual private network (VPN) capabilities and data encryption. However, with Connectria and IBM, these features are all standard, whereas some are optional with Rackspace. Connectria gains a slight edge over IBM by offering integrity monitoring.

| SECURITY | Connectria | Rackspace | IBM |
|-------------------------------|------------|---------------------------|-------------------------|
| DDoS | ● Yes | ● Yes | ● Yes |
| Firewalls | ● Yes | ● Yes | ● Redundant virtualized |
| VPNs | ● Yes | ● Yes | ● Yes |
| Network Intrusion Prevention | ● Yes | ● Optional | ● Yes |
| Integrity Monitoring | ● Yes | ● No | ● No |
| Data Encryption | ● Yes | ● Yes | ● Yes |
| Server Hardening [‡] | ● Yes | ● Yes | ● Yes |
| Viruses/Worms/Malware | ● Yes | ● Optional through Sophos | ● Yes |

[‡] OS hardening

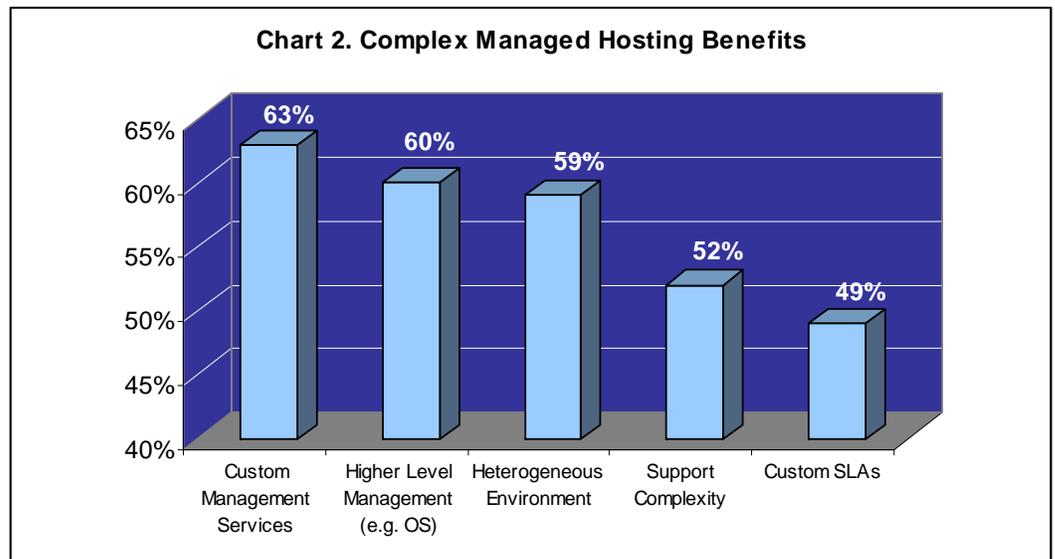
HARDWARE/SOFTWARE OPTIONS

| Connectria | Rackspace | IBM |
|------------|-----------|---------|
| ★★★★★ 5.0 | ★★★ 2.2 | ★★★ 2.3 |

The third important point of comparison related to complex managed hosting is breadth of hardware/software offerings. A company's ability to deliver on complex managed hosting obviously depends in part on its ability to support a wide variety of hardware and software. In this area, Connectria and IBM have an edge over Rackspace. Both Connectria and IBM support not only the Windows and Linux environments but a variety of IBM environments *and* Sun/Solaris. In contrast, Rackspace is entirely focused on Windows and Linux. Connectria, with its focus on *complex* managed hosting, offers many more options in the areas of application servers, thin client applications and e-mail/collaboration.

Some of the differences between the three companies are reflected in the databases they support. All three support MySQL, Microsoft SQL and Oracle, whereas only IBM and Connectria support IBM databases as well, such as DB2.

At least half the respondents to the Complex Managed Hosting Survey ranked the abilities to support heterogeneous environments and to support complexity as highly important. (Custom management and upstack services such as OS management, which ranked even higher, will be discussed shortly.)



Question: Please rate the importance of the following benefits provided specifically by Complex Managed Hosting services on a five-point scale. 1 = Not at all important, 5 = extremely important. (Chart shows percentage who rated each benefit with either a 4 or a 5.)

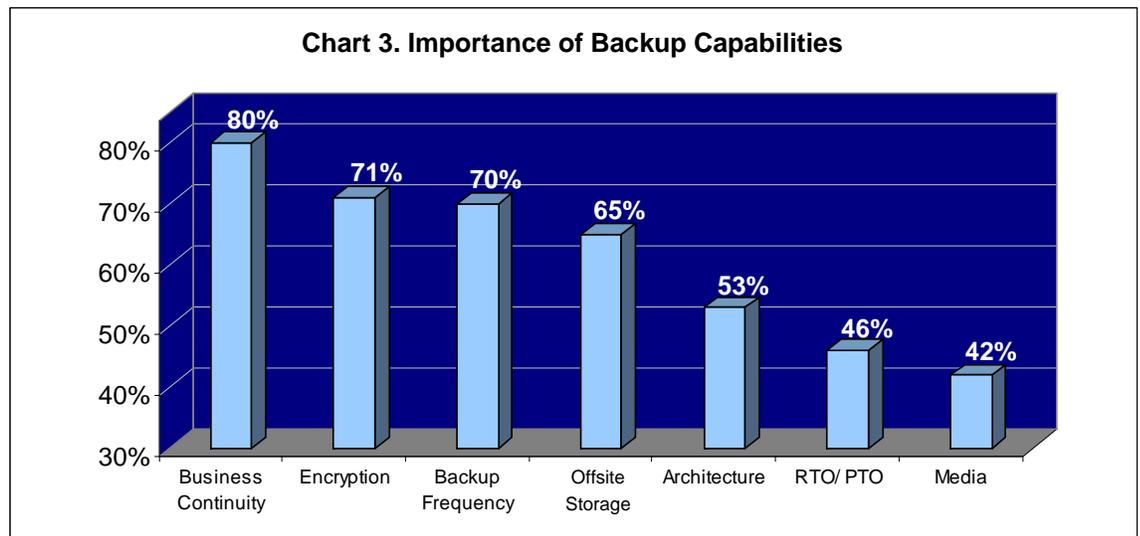
Connectria offers complex managed hosting solutions that include application servers and thin client applications, but the other two vendors do not. Connectria is also unique in its support for legacy applications.

| HARDWARE/SOFTWARE | Connectria | Rackspace | IBM |
|--------------------------|---|--|---|
| Servers | <ul style="list-style-type: none"> ● Dell PowerEdge ● HP Proliant/Integrity ● Multiple IBM options ● Sun SPARC | <ul style="list-style-type: none"> ● Dell PowerEdge ● Rackspace branded | <ul style="list-style-type: none"> ● Intel servers ● Multiple IBM options |
| Operating Systems | <ul style="list-style-type: none"> ● Windows ● Linux ● AIX ● HP-UX ● Solaris ● Multiple IBM options ● IBMi | <ul style="list-style-type: none"> ● Windows 2003 ● Linux | <ul style="list-style-type: none"> ● Windows 2003 ● Linux ● IBMi ● AIX ● Solaris ● Multiple IBM options |
| Databases | <ul style="list-style-type: none"> ● MySQL ● Microsoft SQL ● Oracle ● DB2 ● IMS ● Informix | <ul style="list-style-type: none"> ● MySQL ● Microsoft SQL ● Oracle | <ul style="list-style-type: none"> ● MySQL ● Microsoft SQL ● Oracle ● IMS ● DB2 |
| Application Servers | <ul style="list-style-type: none"> ● IBM WebSphere ● Oracle WebLogic ● Microsoft Windows Server ● Apache/Tomcat/JBoss | <ul style="list-style-type: none"> ● Not supported | <ul style="list-style-type: none"> ● Not supported |
| Thin Client Applications | <ul style="list-style-type: none"> ● Citrix ● Microsoft Terminal Services | <ul style="list-style-type: none"> ● Not supported | <ul style="list-style-type: none"> ● Not supported |
| E-mail and Collaboration | <ul style="list-style-type: none"> ● Microsoft Exchange ● Microsoft Sharepoint ● Blackberry BES ● Lotus Notes/Domino | <ul style="list-style-type: none"> ● Microsoft Exchange ● Microsoft Sharepoint ● Branded e-mail | <ul style="list-style-type: none"> ● Lotus Notes/Domino |
| Custom Applications | <ul style="list-style-type: none"> ● Supported | <ul style="list-style-type: none"> ● Not supported | <ul style="list-style-type: none"> ● Not supported |
| Storage | <ul style="list-style-type: none"> ● Fibre Channel SAN ● NAS ● DAS ● FCoE SAN ● iSCSI SAN | <ul style="list-style-type: none"> ● Fibre Channel SAN ● NAS ● DAS ● SATA SAN | <ul style="list-style-type: none"> ● Virtual SAN |

BACKUP

| Connectria | Rackspace | IBM |
|------------|-----------|----------|
| ★★★★★ 5.0 | ★★★★ 4.0 | ★★★★ 4.0 |

In the area of backup, all three companies cover the basics, typically with some form of daily incremental backup supplemented by a complete weekly backup. Offsite backup is available from all three, as is encrypted backup, and all three offer private connections to data. Connectria has a slight edge because all of its offerings are standard, whereas offsite backup is optional with Rackspace, and custom backup options are optional with IBM.



*Question: Assuming you are evaluating Complex Managed Hosting service providers, please rate the importance of these backup-related factors on a 5 point scale. 1 = Not at all important, 5 = extremely important. (Chart shows percentage who rated each benefit **with** either a 4 or a 5.)*

As Chart 3 indicates, backup options are important to a high percentage of respondents, particularly as they relate to business continuity.

Precise comparisons are difficult to make with backup because each provider offers multiple options. This is therefore an area where the details of the contract are particularly significant.

| BACKUP | Connectria | Rackspace | IBM |
|-----------------------|--------------------------------|--------------------------|--------------------------------|
| Frequency | ● Daily incremental/ weekly | ● Daily incremental | ● Daily incremental/ weekly |
| Encryption Available | ● Yes | ● Yes | ● Yes |
| Offsite Backup | ● Weekly offsite | ● Optional ^{††} | ● Weekly offsite |
| Private Connections | ● Yes | ● Yes | ● Yes |
| Custom Backup Options | ● Yes | ● Yes | ● Yes |

MANAGED HOSTING SERVICES

| Connectria | Rackspace | IBM |
|------------|-----------|-----------|
| ★★★★☆ 4.6 | ★★★★☆ 4.3 | ★★★★☆ 4.5 |

All three providers offer a mix of managed hosting services that extend significantly beyond the range of conventional managed hosting, including turnkey database administration and the monitoring and installation of OS patches and updates. All three also offer web servers and application servers and management, although Connectria has an edge in that it provides these services directly, whereas both Rackspace and IBM provide them through third parties. All three vendors also perform a variety of functions to ensure that their customers have adequate IT capacity available to meet fluctuating needs, including capacity monitoring, load balancing and database clustering. IBM alone provides convenient, pre-engineered, task-oriented packages.

†† U.S. \$5.00 per server per month

| MANAGED HOSTING SERVICES | Connectria | Rackspace | IBM |
|--------------------------------------|---|---|---|
| DBA | <ul style="list-style-type: none"> ● Rack install ● Configuration settings ● Performance tuning ● Replication ● Backup | <ul style="list-style-type: none"> ● Rack install ● Configuration settings ● Performance tuning ● Replication ● Backup | <ul style="list-style-type: none"> ● Rack install ● Configuration settings ● Performance tuning ● Replication ● Backup |
| OS Management | <ul style="list-style-type: none"> ● Patches ● Updates | <ul style="list-style-type: none"> ● Patches ● Updates | <ul style="list-style-type: none"> ● Patches ● Updates |
| Web and App Servers | <ul style="list-style-type: none"> ● WebLogic (Oracle) ● Websphere | <ul style="list-style-type: none"> ● WebLogic (Oracle) ● Websphere (w/Headstream) | <ul style="list-style-type: none"> ● Available through third parties |
| Batch Processing | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes |
| Load Balancing | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes |
| DB Clustering | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes |
| Performance Tuning | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes |
| Capacity Monitoring | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Yes | <ul style="list-style-type: none"> ● Threshold monitoring |
| Pre-designed, Task-Specific Packages | <ul style="list-style-type: none"> ● No | <ul style="list-style-type: none"> ● No | <ul style="list-style-type: none"> ● Yes |

FLEXIBILITY

| Connectria | Rackspace | IBM |
|------------|-----------|---------|
| ★★★★★ 5.0 | ★★★★ 3.8 | ★★★ 2.5 |

Flexibility can be important, particularly for companies in volatile markets or those with special needs. All the providers offer some measure of customization, either via a basic-package-plus-options model (Rackspace, IBM) or a full customization option (Connectria). Both Rackspace and Connectria allow customers to modify agreements over time (e.g. add server capacity) if a customer's requirements change. Connectria claims to offer the highest degree of flexibility, and this is certainly credible due to its smaller size, which provides an inherent advantage in this category.

| FLEXIBILITY | Connectria | Rackspace | IBM |
|--|------------|--------------------|----------------------|
| Cap Investment to Meet Specific Needs | ● Yes | ● No ^{‡‡} | ● No ^{§§} |
| Standard SLAs | ● Yes | ● Yes | ● Yes |
| Customized SLAs | ● Yes | ● Yes | ● Yes |
| Agreement Modifications During Agreement | ● Yes | ● Yes | ● Data not available |

TAILORED SALES AND SUPPORT

| Connectria | Rackspace | IBM |
|------------|-----------|---------|
| ★★★★ 4.0 | ★★★★ 4.0 | ★★★ 2.5 |

Sales and support are the most difficult factors to evaluate objectively. The selling style of a company can't easily be put into a matrix; and although certification and years of experience can be quantified, enthusiasm and talent can't. The only way to evaluate these essential qualities is through actual personal contact. Nonetheless, some parameters can be objectified.

Both Rackspace and Connectria provide an integrated administrative team with a dedicated account manager and technical support team for every customer. IBM may or may not offer this business model, depending on the size of the customer's account and the relationship with IBM. Connectria emphasizes that the same personnel who are charged with delivery and support are involved in presale activities, which is certainly a plus for potential customers trying to make a comprehensive and accurate evaluation of their provider options.

^{‡‡} Within the Windows/Linux space, it can be assumed that all necessary resources will be available.

^{§§} IBM operates under the assumption that required resources will be available.

| SALES & SUPPORT | Connectria | Rackspace | IBM |
|------------------------------------|-------------------|-------------------|--|
| Dedicated Act. Mgr. and Team | ● Yes | ● Yes | ● Varies with size of account and IBM relationship |
| Dedicated Support Team | ● Yes | ● Yes | ● Varies with size of account and IBM relationship |
| Sales/Support Team Structure | ● Integrated team | ● Integrated team | ● Varies with size of account and IBM relationship |
| Access to Senior Mgt. | ● Yes | ● Yes | ● No |
| Available through Channel Partners | ● No | ● No | ● Yes |

PRICING FLEXIBILITY

| Connectria | Rackspace | IBM |
|------------|-----------|-----------|
| ★★★★★ 5.0 | ★★★★☆ 4.5 | ★★★★☆ 4.5 |

Providers are naturally reluctant to comment on pricing in any detail, because so often a price depends on multiple factors. However, all three providers do offer fixed-price packages, unmetered support and some measure of customized pricing.

| PRICING FLEXIBILITY | Connectria | Rackspace | IBM |
|-----------------------------|------------|---|---|
| Fixed-Price Packages | ● Yes | ● Yes | ● Yes |
| Customized Pricing | ● Yes | ● Yes, through base price + options model | ● Yes, through base price + options model |
| Support Metered or Flat Fee | ● Flat fee | ● Flat fee | ● Flat fee |

CONCLUSION

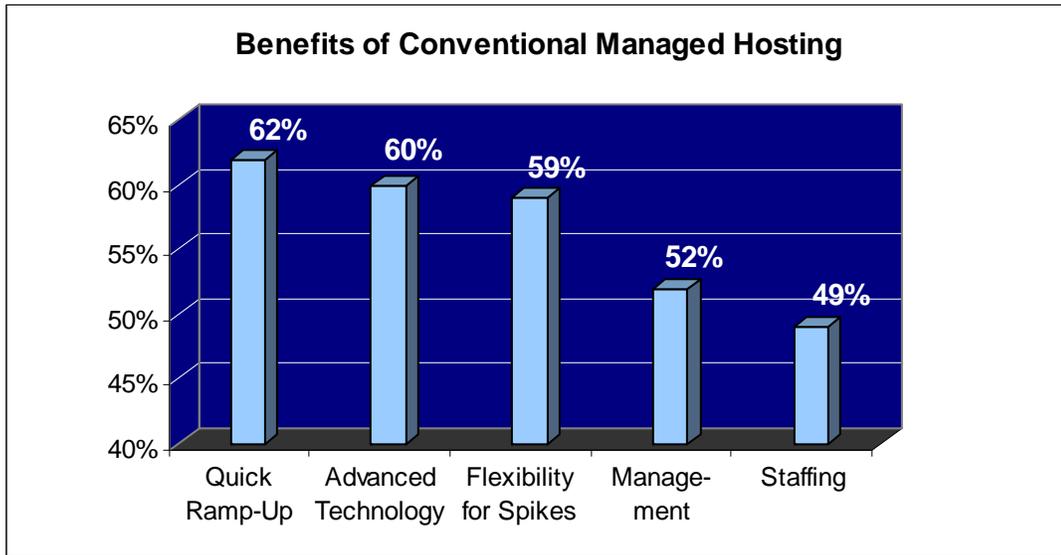
The ultimate conclusion that can be drawn from the data in this paper is that viable solutions involving complex managed hosting are available from all the providers evaluated, although there are important differences. Obviously, complex managed hosting is not a central focus for IBM, and its marketing materials tend to emphasize fixed packages to meet the needs of customers with standard requirements rather than companies whose needs are outside the mainstream. Rackspace is certainly a viable candidate for conventional managed hosting, but its offering falls far short in addressing the needs of companies with multi-vendor environments. Connectria's consistent focus on complexity and customized offerings will clearly be attractive to customers with special needs, but its U.S.-centric focus will rule it out for some organizations.

In the end, finding the right fit involves a level of detail that can only be ascertained through direct contact, personal evaluation and a precise definition of specific needs.

APPENDIX

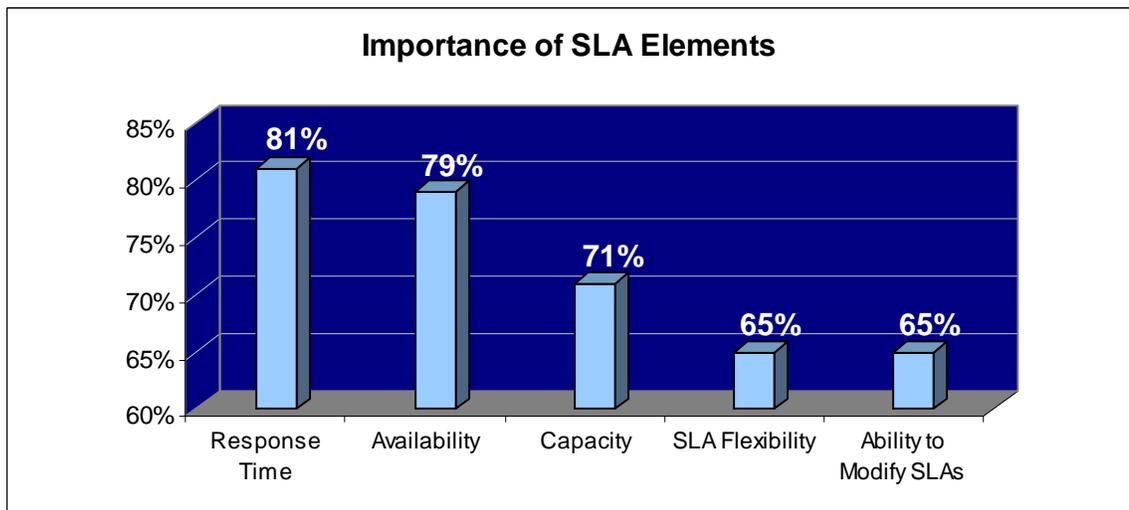
This appendix presents highlights of survey results in addition to those featured in the report.

CONVENTIONAL MANAGED HOSTING



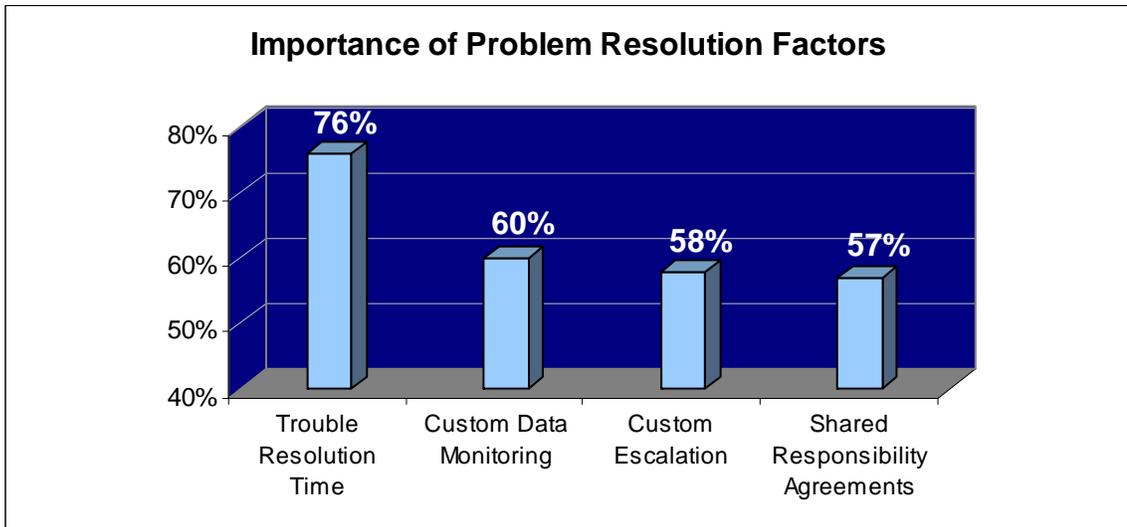
Question: Please rate the importance to your organization of the following benefits provided by Managed Hosting services (including Complex Managed Hosting services), using a five-point scale. 1 = Not at all important, 5 = extremely important. (Chart shows percentage who rated each benefit with either a 4 or a 5.)

SERVICE-LEVEL AGREEMENTS



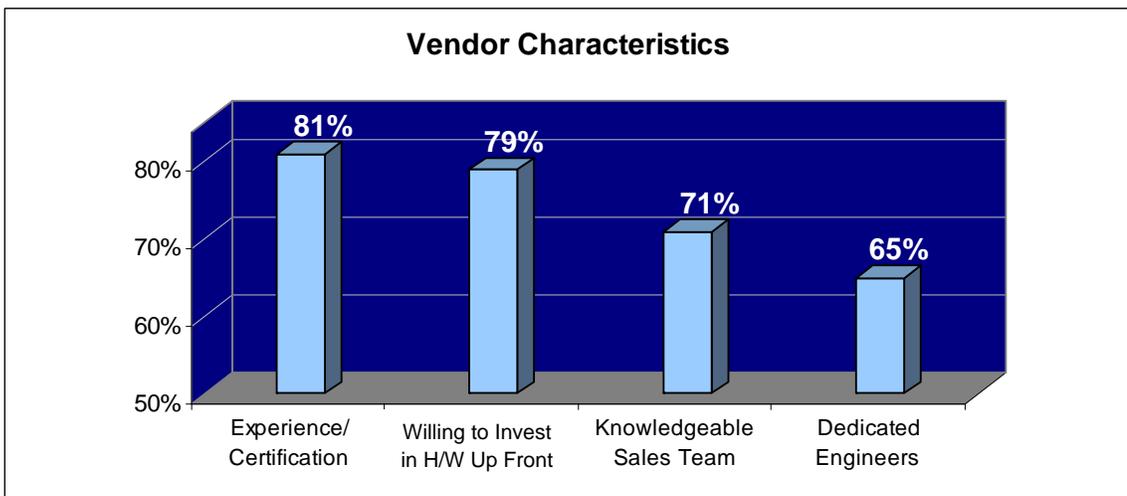
Question: Service-Level Agreements (SLAs) define the entire scope of the Complex Managed Hosting contract. Assuming you are evaluating Complex Managed Hosting service providers, please rate the importance of these SLA factors on a five-point scale. 1 = Not at all important, 5 = Extremely Important. (Chart shows percentage who rated each benefit with either a 4 or a 5.)

PROBLEM RESOLUTION



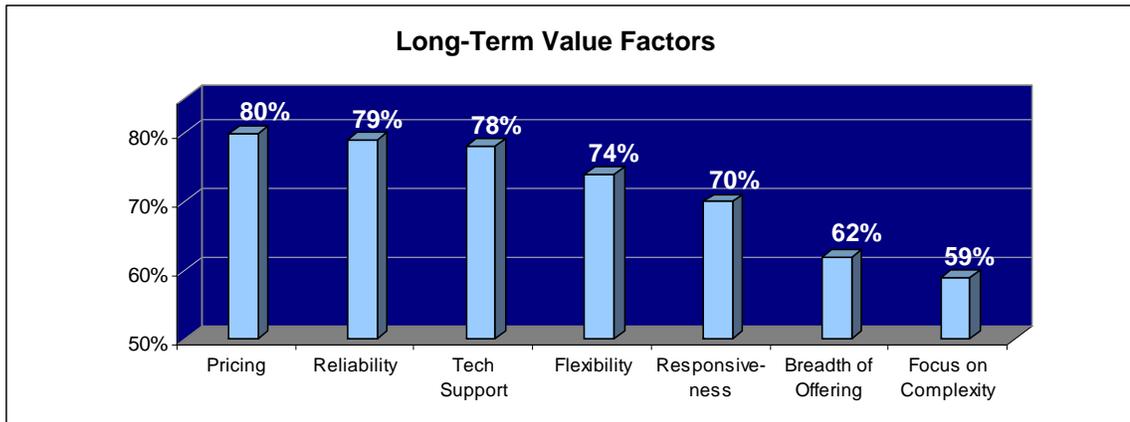
Question: Management and problem resolution are important functions of any IT organization. Assuming you are evaluating Complex Managed Hosting service providers, please rate the importance of these management and problem resolution factors on a five-point scale. 1 = Not at all important, 5 = Extremely important. (Chart shows percentage who rated each benefit with either a 4 or a 5.)

VENDOR CHARACTERISTICS



Question: Assuming you are evaluating Complex Managed Hosting service providers, please rate the importance of these vendor characteristics on a five-point scale. 1 = Not at all important, 5 = Extremely important. (Chart shows percentage who rated each benefit with either a 4 or a 5.)

OVERALL VALUE



Question: Assuming you are evaluating Complex Managed Hosting service providers, please rate the importance of these long-term value factors on a five-point scale. 1 = Not at all important, 5 = Extremely important. (Chart shows percentage who rated each benefit with either a 4 or a 5.)

Connectria

Connectria began providing managed hosting in 1998 with only one client... that just happened to be the world's largest bank, Deutsche Bank. The company's second client was IBM. By building its service platform to the exacting standards of these clients, Connectria has since been able to add nearly 1,000 clients worldwide that rely on Connectria for managed hosting, remote management, disaster recovery and 24/7 support of their complex server technologies. Connectria supports complex hardware and software technologies from Blackberry, Cisco, Citrix, Dell, EMC, HP, IBM, Lotus, Oracle, Microsoft, Sun, VMware and many more. To learn more, visit <http://www.connectria.com>.

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About the Author

Mike Stevens began his career as technical writer in semiconductor manufacturing and then switched to marketing. At his own Silicon Valley-based agency, he worked with an impressive list of clients, including HP, EMC, Fujitsu and Microsoft. His primary focus for the last seven years has been enterprise IT.