



**Research**<sup>®</sup>  
Market Monitor<sup>™</sup>

# Open Source Cloud Platforms: OpenStack

This Market Monitor overview report on the OpenStack marketplace provides updated vendor estimates through Q315. OpenStack, the open source cloud project, was established in 2010 and has quickly garnered much industry attention. This report provides updated estimates and a five-year growth forecast for the OpenStack market and three segments: OpenStack Service Providers; OpenStack Products, Distribution and Management; and Cloud Management. We have removed the PaaS Providers and DevOps segments to realign our analysis on purpose-built OpenStack products and services. In addition, we have provided more granular segmentations of the Service Provider (public vs. private cloud) and the Products, Distribution and Management (distros, IT Services and training) segments. Our analysis is based on results from bottom-up market sizing that incorporates revenue estimates and forecasts for 60 competing OpenStack market participants.

This report leverages 451 Research's deep knowledge of and relationships within the OpenStack market, resulting in a proprietary forecast based on an analysis of individual vendors' current revenue and growth expectations through 2019. This analysis was developed and will be maintained with the support of our qualitative sector analysts, primarily Al Sadowski, Research Director, and Jay Lyman, Research Manager. Included in the report is our OpenStack taxonomy, market-sector revenue estimates, growth forecasts and a view of the competitive landscape for each of the sectors outlined above.

**Greg Zwakman**  
Research Director,  
Quantitative Services

**Kathleen Frodyma**  
Research Associate,  
Quantitative Services

**Al Sadowski**  
Research Director,  
Service Providers

**Jay Lyman**  
Research Manager,  
Cloud Platform

## About 451 Research

451 Research is a preeminent information technology research and advisory company. With a core focus on technology innovation and market disruption, we provide essential insight for leaders of the digital economy. More than 100 analysts and consultants deliver that insight via syndicated research, advisory services and live events to more than 1,000 client organizations in North America, Europe and around the world. Founded in 2000 and headquartered in New York, 451 Research is a division of The 451 Group.

© 2014 451 Research, LLC and/or its Affiliates. All Rights Reserved. Reproduction and distribution of this publication, in whole or in part, in any form without prior written permission is forbidden. The terms of use regarding distribution, both internally and externally, shall be governed by the terms laid out in your Service Agreement with 451 Research and/or its Affiliates. The information contained herein has been obtained from sources believed to be reliable. 451 Research disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although 451 Research may discuss legal issues related to the information technology business, 451 Research does not provide legal advice or services and their research should not be construed or used as such. 451 Research shall have no liability for errors, omissions or inadequacies in the information contained herein or for interpretations thereof. The reader assumes sole responsibility for the selection of these materials to achieve its intended results. The opinions expressed herein are subject to change without notice.

### **NEW YORK**

20 West 37th Street  
3rd Floor  
New York, NY 10018  
**P** 212 505 3030  
**F** 212 505 2630

### **SAN FRANCISCO**

140 Geary Street  
9th Floor  
San Francisco, CA 94108  
**P** 415 989 1555  
**F** 415 989 1558

### **LONDON**

37-41 Gower Street  
London, UK WC1E 6HH  
**P** +44 (0)20 7299 7765  
**F** +44 (0)20 7299 7799

### **BOSTON**

125 Broad Street  
4th Floor  
Boston, MA 02109  
**P** 617 261 0699  
**F** 617 261 0688

# Table of Contents

[Methodology](#)

[Data Sources](#)

[451 Research's OpenStack Coverage](#)

[OpenStack Primer: A Brief History](#)

[OpenStack Primer: Features](#)

[OpenStack Market Taxonomy](#)

[OpenStack Segment Definitions](#)

[OpenStack Market Sizing Scope](#)

[Vendor Participation by Sector](#)

[Total OpenStack Market](#)

[Ecosystem Segment Revenue](#)

[Revenue and Vendor Count by Segment](#)

[Growth Expectations by Segment](#)

[2014 Vendor Revenue Distribution \(Ownership\)](#)

[2014 Vendor Revenue Range Details](#)

[2014 Vendor Revenue Range Details \(Cont.\)](#)

[OpenStack Vendor Count by Revenue Summary  
Public/Private & Enterprise/Service Provider  
Segmentation](#)

[Vendors by TTM Revenue Range](#)

[Market Drivers \(+\) and Challenges \(-\)](#)

[M&A Activity](#)

[Venture Funding](#)

[Service Providers Market Revenue](#)

[Service Provider Vendor Distribution](#)

# Table of Contents

---

[Service Provider Competitive Landscape](#)

[Service Providers Revenue vs. IaaS](#)

[Service Providers Public vs. Private Revenue](#)

[Products, Distributions and Management Market Revenue](#)

[PD&M Vendor Distribution](#)

[PD&M Competitive Landscape](#)

[PD&M Segment Definitions](#)

[PD&M Segment Revenue](#)

[Cloud Management Market Revenue](#)

[Cloud Management Vendor Distribution](#)

[Cloud Management Competitive Landscape](#)

[Vendor Analysis Methodology](#)

[Vendor Analysis Results](#)

[OpenStack Summary Data](#)



60

Vendors included in analysis with individual estimates and forecasts

Our OpenStack database contains individual models on 60 vendors in the market. Each model contains intelligence specific to that company (i.e., customers, pricing, deal sizes and trends) with a forecast that incorporates the unique traits, strengths and weaknesses of the vendor.

100%

Of market estimate and forecast based on individual vendor estimates, no black-box ‘other’ category

A bottom-up analysis entails creating individual estimates and forecasts for each market participant in lieu of relying on historical or related data, applying broad assumptions or extrapolating market totals based on input from a handful of large vendors (a top-down approach).

8 out of 10

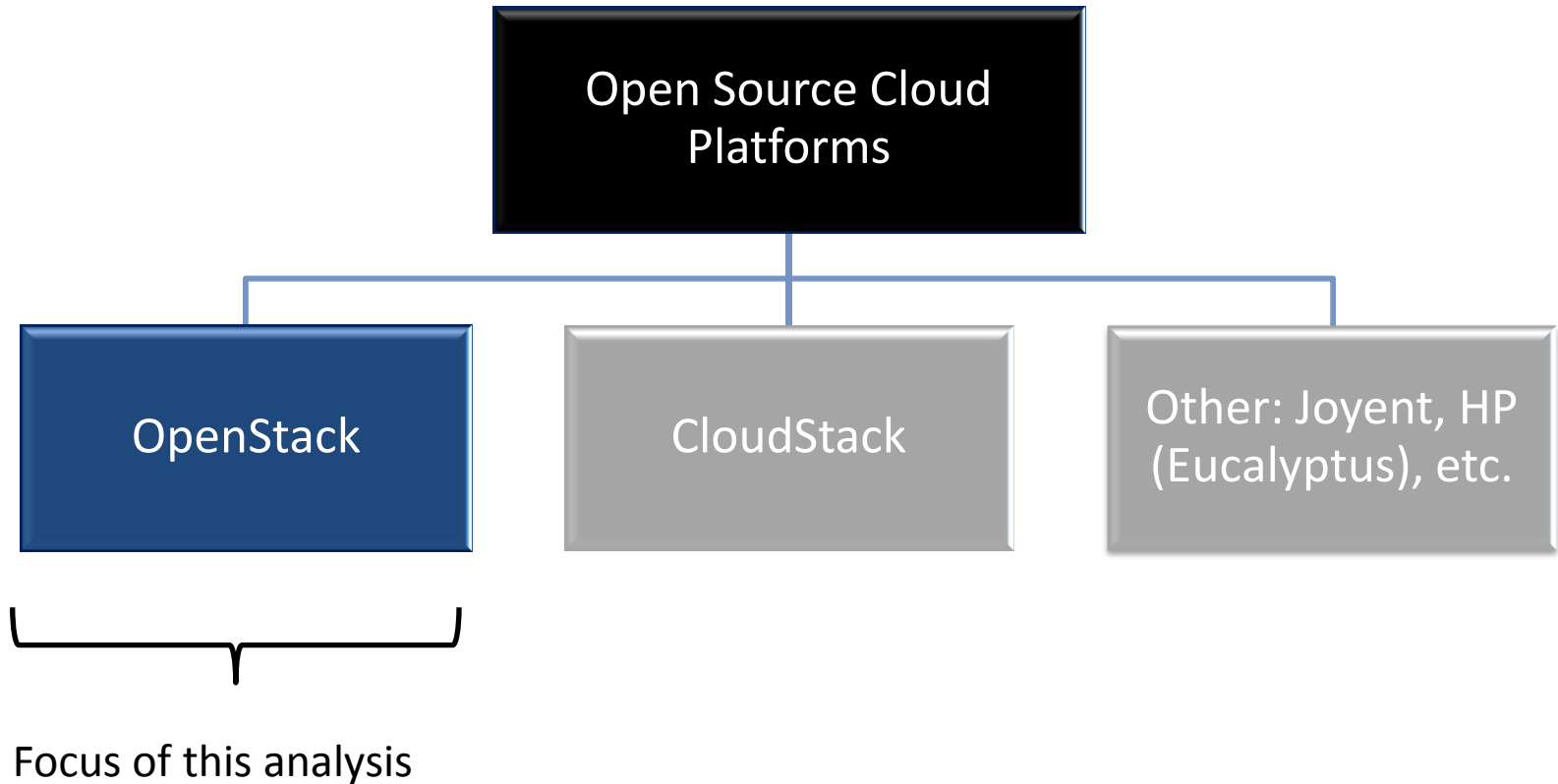
Vendors we have briefed directly to support our findings

This analysis leverages our deep knowledge of and relationships within the OpenStack marketplace, resulting in proprietary forecast of industry revenue based on a bottom-up analysis of each vendor’s current revenue and growth expectations.



15,000	Vendor briefings as a company annually
85+	Sector analysts support estimates
12	Financial analysts contribute to MM
950+	Financial/banking clients provide insight
CXO	Executive-level access across IT landscape
6	End-user surveys performed annually





Greg Zwakman [greg.zwakman@the451group.com](mailto:greg.zwakman@the451group.com)  
415-989-1555 x122

Tim Miller [tim.miller@the451group.com](mailto:tim.miller@the451group.com)  
415-989-1555 x110

Yulitza Peraza [yulitza.peraza@the451group.com](mailto:yulitza.peraza@the451group.com)  
415-989-1555 x156

Kathleen Frodyma [kathleen.frodyma@451research.com](mailto:kathleen.frodyma@451research.com)  
415-989-1555 x166

Or [sales@the451group.com](mailto:sales@the451group.com)



NEW YORK · BOSTON · SAN FRANCISCO · WASHINGTON DC · SEATTLE · DENVER  
LONDON · MOSCOW · DUBAI · SÃO PAULO · SINGAPORE · TAIPEI