Big Data

Industry Report
2014

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1. Executive Summary

The Rise of Big Data: Drivers, Adoption Status & Futures
Big Data: Sizing Market Opportunities & Challenges
Growing Importance of Big Data and Need for Hadoop
The Need for and Special Requirements of Hadoop
Hadoop Technologies, Players and Industry Issues
Suppliers: Leaders and Followers
Acquisitions/M&As, New Investments, Valuations of Startups, (VCs, by Major Players, M&As)

2. Market Drivers & Industry Dynamics

Market Drivers & Inhibitors of NoSQL/Hadoop
Comparisons: Hadoop/NoSQL vs. SQL/RDBMS
Predictive, actionable intelligence – key to new growth markets
User Requirements and needed architectures
New Business Models empowering operational efficiency and revenue growth
Hadoop Economics vs Legacy SQL by Dataset sizes/TeraSorts…
NoSQL consolidations and acquisitions in market's next phase
Merging Hadoop innovations into Nextgen DBMS
Empowerment of Business and Public-Sector Value
Outlook: New Technologies, Emergent Opportunities and Market Sizing.

3. Market Segments & Product Requirements

Existing DBMS Markets by Segments
- Data Warehousing, Business Intelligence & Analytics, Data Integration & MDM
- Capabilities of Existing Solutions
- Market Sizing and Growth by Segments (SQL & NoSQL/UQL)
- Market shares by Segment

Killer Applications benefitting most from Hadoop
Hadoop now a full-fledged market
Big-data-as-a-Service, Analytics databases

Hadoop Usage Profiles
- Companies using Hadoop & State of Deployment (Research vs. Production)
- Applications Targeted
- Deployment Size, Average Cluster Size, I/O Utilization
- Hardware Deployed (Servers/cores, Storage, Networks, Management Tools)
- Performance Bottlenecks (Cluster Inter-nodal Latency, Storage Size, SSDs, Network I/O BW)
- High Availability/SPOF in HDFS, HA in NameNodes
- Role of Requirements for Snapshots, Mirroring, Full Random RW File System

Big Data by Industry
- Requirements by Industry – Financial Services, HealthCare, Retail, Govt., Media, Travel, Web 2.0 etc
- Adoption by Verticals – Financial Services, Health Care, Retail, Govt, Media, Travel, Web 2.0 etc.

4. Market Forecast & Market Shares – Big Data (SQL & UQL)

Market Forecast by Market Segment 2011-15 (SQL vs NoSQL)
Market Forecast by Technology Infrastructure (HW- Servers, Storage, Networking Equipments)
Market Forecast by SW Infrastructures (Distributions, Tools)
Hadoop based HW Equipments Shipments by Units, ASP, Revenues (Servers, Storage, Networking Equipments)
Hadoop HW Equipments Shipments by Region (North America, EUMEA, APAC, ROW)
WW Spending Forecast by Content (Creation and Production)
WW Spending by Content Tools (Content Mgmt, Aggregation,Delivery Tools)

5. Enabling Technologies & Standards

RDBMS   Legacy RDBMS & Modified RDBMS architecture for EDW supporting Data Analytics
Comparison:Hadoop/NoSQL vs. SQL/RDBMS
Big Data: Definitions, New Data Types & Complexity, Roaring Data Volumes & Velocity
Big Data Limitations,
Hadoop: What is Hadoop, How it works, Components (HDFS and MapReduce)
Open-Source Options: Apache Hadoop and Others
Collaboration: Corralling Big Data for Results
HW Impact: In-Memory DB Analytics - MemCache/SSD
Visualization
Standards & Standards Organizations
Emerging Standard Bodies & Progress   Open Source & Apache Standards, Proprietary Offerings, Benchmarks

6. Competitive Products & Positioning

Big Data: Value Chain and Delivery Formats
Big Data: Birth of a new Ecosystem
- Big-data use cases proliferate
- NoSQL finds its role
- Big data, small power bills
- Storage still matters

Hadoop Distributions, Tools & Products
Impact of Hadoop NoSQL on Oracle, IBM, Microsoft, Others
Hadoop Distributions, Tools and Products
Enterprise - Encumbents IBM, SAP, Oracle, Teradata
                - New HP/Vertica, Versant …EMC/Greenplum, Dell, NetApp, Cisco…. Informatica,
Startups (Hadoop) Cloudera, DataStax, KArmasphere, MapR, Aster Data, MarkLogic, Platform, Quest SW, Pervasive SW, Pentaho,10Gen, 1010Data, Hypertable, Tableau ….
Internet Leaders using **Hadoop** Web (Yahoo!, Google, AWS, FaceBook, eBay, Zynga…)

7. Major Suppliers & Supplier Strategies

All 106 Companies in BigData Marketplace
Big Data based Products/Tools/Services Offerings
Existing & Emergent Enterprise Market Leaders now targeting Hadoop
Company Profiles
        Overview, Management, Technology ,Products (- SW Stack: Analytics platform, Business Intelligence, Data Integration; - Hardware stack)
        Delivery Model, Customer Base
        SWOT Analysis (Strengths & Weaknesses …)
The Distributions Hadoop ISVs

Apache Hadoop   Cloudera,IBM,DataStax, EMC, Hortonworks
Hadoop Stack   HDFS (Distributed File system), MapReduce (Job Scheduling), HBase (Realtime Query), Pig (Data Flow), Hive (Batch SQL), Sqoop (Data Import),
                Avro (Serialization), HiPAL, Zookeeper (Coordination), Chukwa (Displaying Monitoring Analyzing Logs), Cassandra, Eucalyptus etc.
…..

8. Routes-To-Market /Channels of Distribution

Present Go-to-Market Models
Pricing Structures by Direct, OEM, Indirect Channels
Vertical Markets Addressed

9. Recommendations

Recommendations specifically for Vendors (Incumbents and Emergents), Channel - System Integrators, VARs, Distributors
Recommendations for End Users in Major Industries impacted by Big Data
Recommendations for Investors (Investment Bankers & Venture Capital)

10. Methodology, Resources & Appendices

Methodology, Resources & References, Appendices with Deep Dive Technical Analysis, Financial Analysts Reports,
Survey/Interviews with VCs, Investment Bankers, Interviews with major companies - Incumbents and Start-Ups

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