

A Matrix42 Special Report on Desktop Virtualization

Management of Virtual Desktops Seen as Key to Successful Adoption

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1 Executive Summary

Research conducted by Matrix42 at CeBIT 2011 reinforces the trend that desktop virtualization is a popular IT initiative among companies of all sizes, but 76% say concerns related to managing the virtual environment are slowing or delaying their adoption of the technology. Specifically, the perceived need for separate physical and virtual management tools and the amount of time and effort to deploy and manage virtual environments are common impediments.

A significant number of companies indicate they are currently adopting or are considering adopting desktop virtualization including 80% of large organizations, 76% of medium sized companies, and 58% of small companies. On average, they plan to virtualize over half, or 61%, of their organizations' desktops. Interestingly, small companies plan to virtualize a much higher proportion of their organizations' desktops than large companies.

What factors continue to drive desktop virtualization initiatives? Not surprisingly, 29% of companies believe desktop virtualization will result in hardware and software cost savings. Another 24% cite flexibility and mobility for users as a primary driver.

Organizations considering desktop virtualization can glean important observations and guidance from their peers' responses to the survey, including:

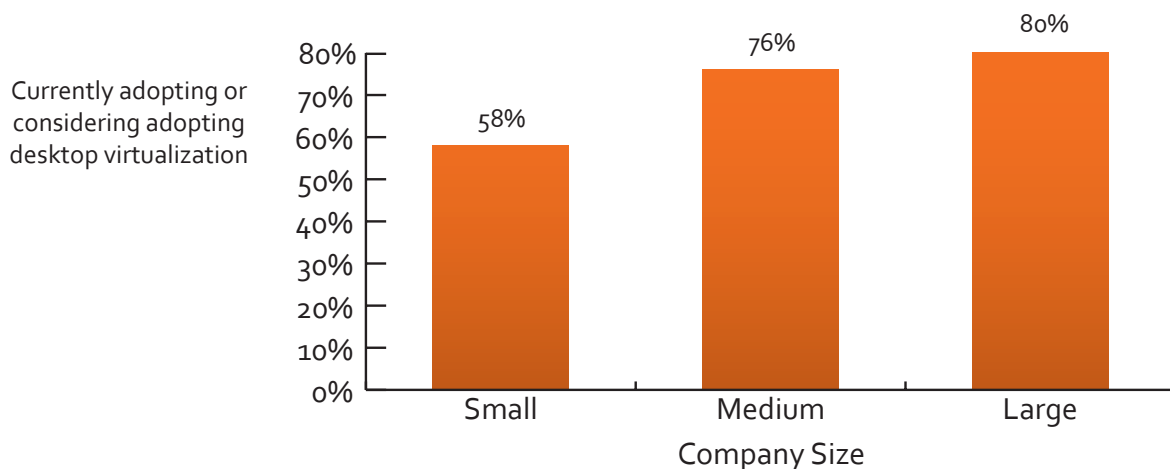
- ▶ Realize that not all your organization's employees are candidates for virtualized desktops; the technology is not necessarily a good fit for every type of user or situation.
 - ▷ *Carefully research which users in your company are good candidates for desktop virtualization - consider how they use their desktop machines, the type of work they commonly do, and the environment or locations where they need to do it.*
- ▶ Don't allow concerns over using separate tools to manage physical and virtual desktops deter your organization from moving forward with the great promise that desktop virtualization holds.
 - ▷ *Look for a tool that manages physical and virtual environments from the same pane of glass; it will save your IT department countless hours of effort in managing a virtualized desktop environment.*
- ▶ Understand that moving to a virtual desktop environment does not eliminate the need for management. This is a common misconception but in reality manageability is as important, if not more important, than ever.
 - ▷ *Document the management requirements specific to your situation and research tools that are available for supporting virtualized desktop environments.*

2 Research Results

Desktop Virtualization Popular Initiative for Companies of All Sizes

A high percentage of companies of all sizes are currently adopting or considering implementing desktop virtualization. Over half of small companies are interested in desktop virtualization while a larger percentage of large and medium companies are adopting or considering it.

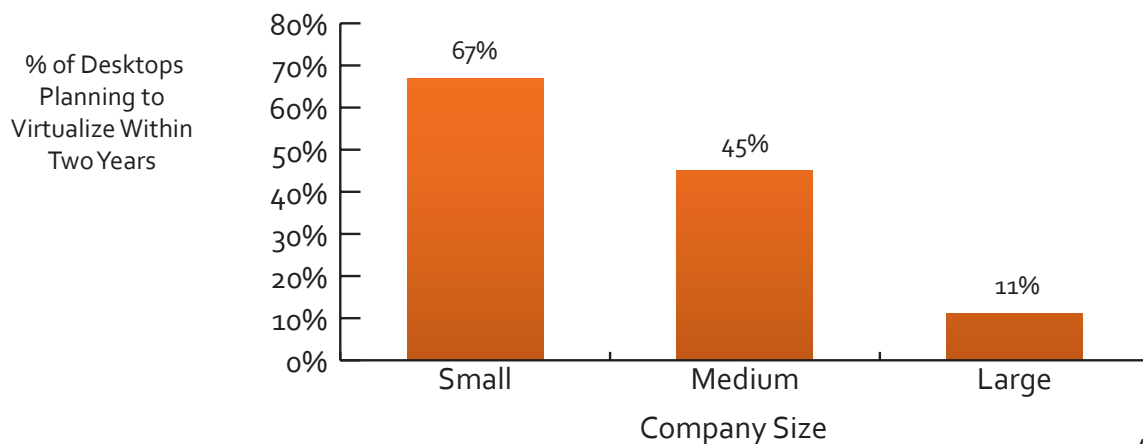
Matrix42 Analysis: It's not surprising many companies are considering desktop virtualization given its promising benefits. However, only 21% of survey respondents have so far implemented any virtualized desktops, which leads us to conclude that organizations are still learning about the technology and gathering information about how to successfully implement it.



Organizations Plan to Virtualize 61% of Desktops within Next Two Years

On average, the organizations that are planning to virtualize plan to virtualize over half, or 61%, of their desktops in the next two years. Small companies plan to virtualize a far higher percentage of desktops than large or medium-sized organizations – perhaps as a means of stretching limited IT resources.

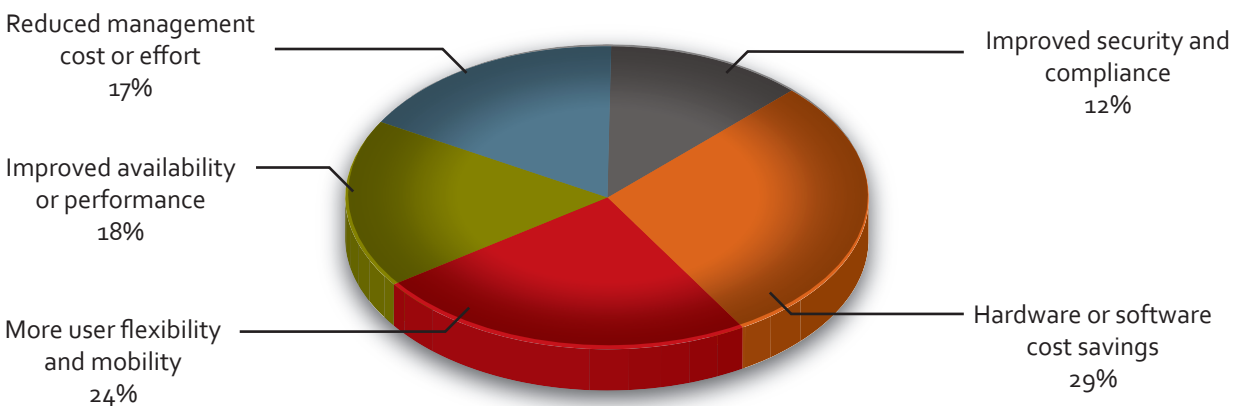
Matrix42 Analysis: While these numbers are fairly high, it's important to note that virtualized desktops aren't appropriate for every situation or every type of user. Although the IT dream may be to virtualize as many desktops as possible, in reality only a certain percentage of an organization's employees are a good fit for the technology.



Most Popular Benefits: Cost Savings and User Flexibility and Mobility

Companies considering desktop virtualization cite two major benefits of implementing it: realizing savings on hardware or software costs and more flexibility and mobility for their users. These reasons are closely followed by improving system availability or performance and reducing management costs or efforts.

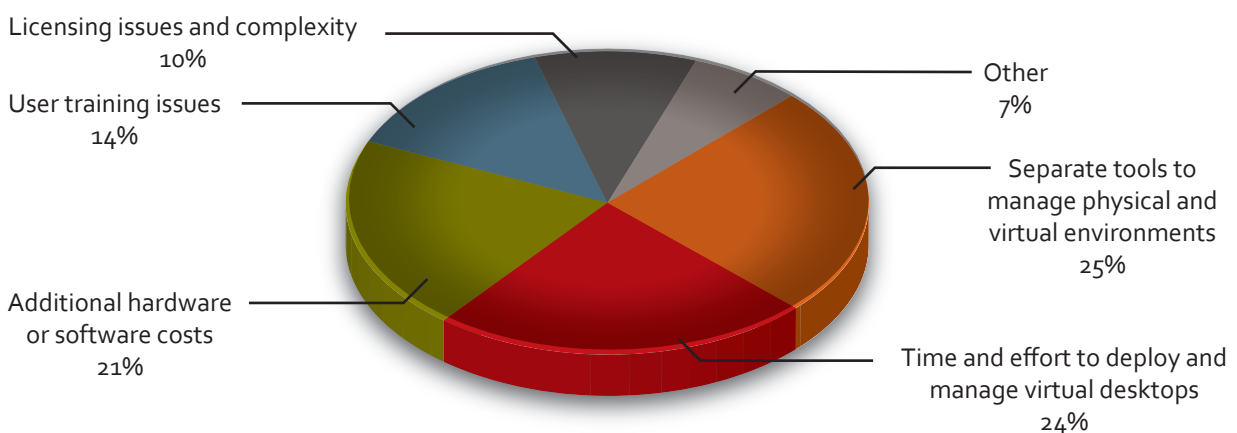
Matrix42 Analysis: Cost savings are a popular reason for moving to desktop virtualization, but organizations should also closely examine the total cost of ownership, including upfront licensing and infrastructure costs, on-going management, additional datacenter hardware purchases, IT staff training, and the possibility of hiring additional staff to manage the new infrastructure. Further, many of the expected savings will only be realized with proper management processes and tools.



Desktop Virtualization Management Challenges Slow Adoption

Although organizations are very interested in desktop virtualization, 76% say the barriers listed below are slowing or inhibiting their initiatives. The top two barriers are related to challenges in managing desktop virtualization: using separate tools for managing physical and virtual environments and time and effort to deploy and manage virtual desktops.

Matrix42 Analysis: This data highlights the growing awareness that management is key to successful adoption and must be carefully planned prior to implementation. Organizations understand the importance of selecting tools that can manage both physical and virtual environments from a single pane as a key method for saving IT staff time and effort. Also, it is a common perception that virtualization eliminates the need for management – in reality, this is not true and these results show the market is starting to understand this issue.



3 Survey Methodology

Matrix42 conducted this non-scientific survey of 86 attendees at CeBit 2011 in Hannover, Germany in March of 2011. The survey was offered in either English or German, depending on the respondent's preference.

Respondents' companies were categorized as small, medium, or large depending on the number of self-reported desktops in their organization:

- ▶ 57% of respondents work for small companies with 100 or fewer desktops
- ▶ 5% work for medium-sized companies with 101-1000 desktops
- ▶ 18% work for large companies with 1001-15,000+ desktops

4 About Matrix42

Matrix42 is the leading supplier for Workplace Management solutions. Matrix42 Workplace Management enables the seamless management of physical and virtual environments. It combines Client Lifecycle, Cloud, SaaS, Virtualization and Service Management into a holistic solution enabling users to have transparent access to their data and services everywhere, from any virtual or physical device at any time. Standards and automation will be enhanced while the user's autonomy and productivity will be increased.

Founded in 1992, Matrix42, with headquarters in Neu-Isenburg near Frankfurt Germany, has been established in the dynamic IT market for over 15 years. The company employs over 220 employees worldwide and is represented in Europe and the USA. Over 3 million clients are managed with more than 1,500 customers worldwide. Market-leading companies such as Infineon, Magna, Lufthansa Systems and Puma and integrators like T-Systems, Raiffeisen IT, msg systems and Bechtle rely on Matrix42 solutions. In early 2008, Matrix42 became part of the Asseco Group. With over 8,000 employees and a market capitalization of around 1.2 billion Euros, Asseco is one of the largest European software companies.



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