

## User virtualization pioneer AppSense consolidates its gains in North America

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### Event summary

- In June 2009, we noted AppSense's expansion of its US operations and the addition of Softricity and DeskTone founder and CEO Harry Ruda to the company's executive advisory board. How has AppSense been doing since then?
- Pretty well. Government contractor Force 3 selected AppSense as its partner in providing virtual workspaces to federal agencies, including the DoD. VMware gave the company's software two awards, and AppSense saw record growth in Q3.
- In October 2009, the company announced support for Citrix Systems' XenDesktop 4. Citrix now recommends AppSense to customers that need more sophisticated personalization of user workspaces than Citrix itself can provide.

### The 451 take

It's an altogether impressive performance in a tough market. In aiming to virtualize and manage all technical details associated with desktop users – their personalization settings, configuration policies, personally downloaded applications and data – AppSense effectively defined the notion of user personalization. With XenDesktop and Windows 7 adoption expected to pick up in lockstep in 2010, and with the possibilities for cloud-delivered desktops discussed more and more seriously every day, the company stands to do even better over the next 12 months.

### Details

Privately held **AppSense** is looking to clock up \$30m in revenue in financial year 2009. The company employs 160 people and has offices in the US, UK, Germany, the Netherlands and Australia. It claims to have 3,500 enterprise customers, including **ESPN, JPMorgan Chase, Lockheed Martin, UBS AG, Raytheon, Barclays, Deutsche Bank, Citi** and **VMware** itself. **CSC, EDS** and **Hewlett-Packard** are important strategic partners.

The company provides personalization and policy management to server-hosted virtual desktops, terminal services, virtualized applications, local and provisioned desktops. Its goal is to build an enduring business in what it calls 'user environment management' – what The 451 Group calls user virtualization.

## Competitive landscape

Five desktop virtualization stack vendors incorporate some user virtualization features: **Citrix**, with technology from **sepago**, **MokaFive**, **Quest Software**, **Symantec** and **Virtual Computer**. We also track a dozen or so pure plays: AppSense itself, **Atlantis Computing**, Centrix Systems, **Entrigue** (now part of **Liquidware Labs**), **RES Software**, **RTO Software**, **Scense**, **SlickAccess**, **Tranxition**, **triCerat**, **Unidesk**, **Viewfinity** and **visionapp**.

In our July 2009 long-form report, User Virtualization: Roam if you want to, we split these vendors into five broad categories. AppSense and RTO are examples of profile managers, embracing and extending the basic **Microsoft** roaming and mandatory profile features of Windows NT and subsequent operating systems. RES Software and Tranxition seek to replace those profiles altogether. RES is doing particularly well with a combination of user virtualization and automation, and its revenue outstrips even that of AppSense.

MokaFive and Virtual Computer include user virtualization as part of their client-hosted desktop frameworks. Centrix, Scense, SlickAccess and visionapp offer personalized application portals, and Atlantis, Unidesk and Viewfinity combine user virtualization with next-generation application decomposition.

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