REPORT REPRINT

Vnomic targets multi-cloud workload management

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THE 451 TAKE

There is a rich vein of opportunity for suppliers that can deliver cloud conversion to SAP customers that are seeking to transform to cloud via the SAP HANA requirement. Once customers are using SAP HANA, they will typically start using it for other functions such as SharePoint or Exchange, high availability, disaster recovery and firewalls – this is the follow-on business that is Vnomic's key opportunity. Vnomic says that SAP typically accounts for about 3% of a customer's IT deployment footprint but some 15% of IT budgets.

CONTEXT

Vnomic models a customer's application and workload requirements in its expert system, matches these to hyperscaler capabilities then migrates and manages the deployments. It's a best execution engine, matching workloads to the most appropriate resources. 451 Research Voice of The Enterprise data shows that enterprise workloads are on the move – to public and private cloud environments, which Vnomic is targeting.

WORKLOAD DEPLOYMENT VENUES, 2018 AND 2020: BALANCE SHIFTS TO OFF-PREMISES
Source: 451 Research, LLC
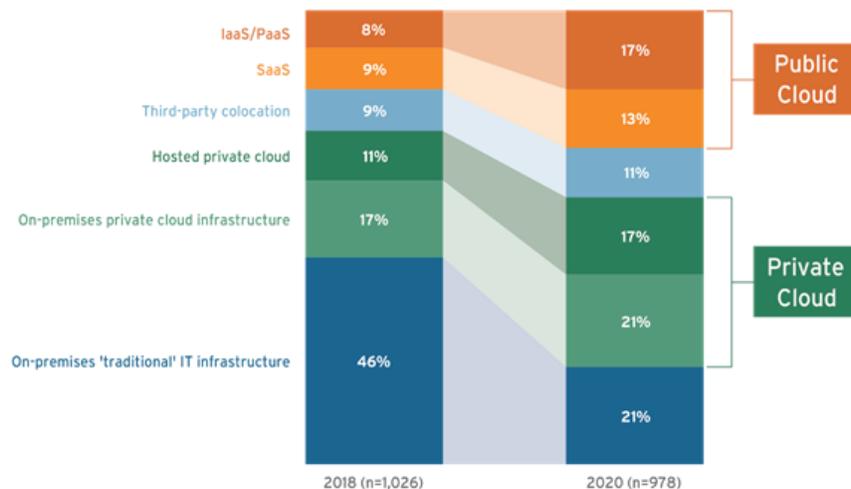
Q. Thinking about all of your organization's workloads/applications, where are the majority of these currently deployed?
Q. Thinking about all of your organization's workloads/applications, where will the majority of these be deployed two years from now?

Source: Voice of the Enterprise: Digital Pulse, Workloads & Key Projects 2018

Vnomic has always been working to automate complex application system deployments, primarily in partnership with SAP, and mostly implemented in conjunction with on-premises Cisco UCS servers and NetApp FlexPod converged infrastructure as well as Lenovo equipment. However, its key focus is now multi-cloud workload management and specifically the enterprise conversion to cloud that is being driven by SAP HANA – after 2025, SAP's software will run on only one database – SAP HANA.

Vnomic automates infrastructure provisioning and configuration including resource selection, interconnection topology, tracking, tenancy and resource management. It also automates software deployment and configuration including operating system services, installation, component dependency mapping, identity, compliance and consumption of external services. It supports Cisco (UCS for HANA), Hewlett Packard Enterprise and Lenovo equipment in private clouds.

TECHNOLOGY

The Vnomic MetaDirector determines the application and cloud infrastructure provisioning, governance and auditability requirements and delivers the resulting workload 'landscape' on virtual, bare-metal or container-based systems. To do this, Vnomic MetaDirector captures best practices for workload building blocks including firewall, load balancers, compute, network, storage, backup, high availability and disaster recovery. Vnomic MetaDirector includes a modeling framework that expresses application components, best practices, dependencies and interrelationships and infrastructure requirements as application building blocks. Vnomic Service Designer allows service architects to snap together building blocks into Application Service Models that describe application landscapes independent of infrastructure. Policies are used to expose and configure customization points and Vnomic Desired State Controller interprets these Application Service Models as desired state specifications and provisions them accordingly.

With this, Vnomic believes it can address what it sees as the entire SAP HANA landscape deployment 'problem statement' from deployment, changes, re-testing and governance. Its workload assessment management program works across ERP and custom applications, database and SAP HANA sizing and takes up to two weeks (assessment, analysis, proposal creation), and delivers a fixed price proposal (for migrating to HANA), sizing recommendations and training. Vnomic estimates that typical cloud workload deployment (NetWeaver, HANA, databases, Splunk) takes between 60 and 180 days. It claims that end-to-end deployment of workloads across the configured cloud using Vnomic takes less than six hours (analyze environment, configuration, mapping, pricing, deploy, audit).

BUSINESS MODEL

Sunnyvale, California-based Vnomic was founded in 2009 by CTO Derek Palma, best known as the co-editor of OASIS TOSCA (the Topology and Orchestration Specification for Cloud Applications). CEO Allen Bannon is a former SAP VP, where he led the development of the Netweaver Landscape Management product, an automation tool for SAP system operations. Vnomic has received angel funding (amounts undisclosed), has 50 staff and is cash flow positive on revenue of about $10m. It says it has VC offers in hand for growth and expansion – at nine years old now, it is beyond the need for funding to build its core services. It's been working with both service providers and enterprises, and has 'several hundred' customers in total. It is targeting enterprises spending $500,000 or more on IT.

CenturyLink uses Vnomic and Cisco ACI to deliver its SAP HANA cloud conversion service to customers as part of its Cloud Managed Services offering. Prior to this, Vnomic says CenturyLink required a couple of months to undertake the implementation and post-delivery management, which has now been reduced to a matter of hours.

COMPETITION

Now configured for multi-cloud workload management, with a specific focus on complex SAP SAP HANA environments, Vnomic will be competing with the likes of Dell Virtustream, as well as the hyperscaler and cloud services suppliers themselves which are now building out their SAP programs, partnerships and ecosystems as they seek to suck enterprise workloads in the cloud. Many companies are foregrounding expertise in moving ERP workloads to cloud as the shift to cloud deployment accelerates. Capgemini, Fujitsu, HPE, Rackspace, NTT/Dimension Data and Symmetry are competitors, as well as the Indian-heritage systems integrators.

SWOT ANALYSIS

STRENGTHS
After 2025, SAP's software will run on only one database – SAP HANA. SAP has asked Vnomic to help customers with the transition, especially in the context of converting to cloud. All the hyperscalers have SAP practices, although these are mostly manual-only capabilities – Vnomic's approach is automated.

WEAKNESSES
Cost and time to delivery are the key enterprise requirements for SAP HANA and cloud conversions. Vnomic will need to bring customer wins into view to credential its approach, especially in a crowded sector.

OPPORTUNITIES
SAP is a spear tip for enterprise-wide conversions to cloud – once complex SAP workloads are on the move, this serves as a dog whistle for all other kinds of enterprise applications. Once SAP applications go on to cloud hyperscaler servers, others will follow. Vnomic has identified a range of so-called 'landscapes' that can be considered for conversion into cloud as a result. It is the ongoing management and optimization of these deployments that is Vnomic's key opportunity.

THREATS
The rise of SAP into cloud deployments is beginning to gather momentum and the opportunity is mostly ahead. SAP CEO Bill McDermott was in Hangzhou recently at the Alibaba Cloud conference to support Alibaba's push into the enterprise with SAP HANA on Alibaba Cloud. Vnomic will need to avoid the squeeze of the hyperscalers (also its partners) as they themselves scale their ambitions here with partner programs.