



BMC Software Evaluation for Selecting a Cloud Management Solution – Technology Decision Matrix, 2013 – 14

SUMMARY

The role and purpose of IT in an organization is undergoing significant change, driven by the need for businesses to become more agile and have greater control over the cost levers when it comes to using technology. This transformation of IT involves many different aspects, not all of which are technology related, but the one thing they all share in common is that IT modernization is about changing to meet the current and future demands of business. This report provides a side-by-side comparison of leading virtualization and cloud management solutions, looking at IT modernization from a data center infrastructure perspective, with the findings delivered as the Ovum Decision Matrix (ODM). It considers the significance of management in the virtualization and cloud environments and how this aspect influences how technology is deployed, used, and controlled.

OVUM VIEW

The current state of the virtualization market is characterized by many proprietary technology stacks. This is partially due to a lack of open standards adopted by the many different vendors. The cloud computing market is similarly fragmented with many different standards, platforms, and services. Ovum considers that the management layer is now assuming the responsibility for providing interoperability between technology solutions, while at the same time applying a business perspective. We believe that as virtualization and cloud computing expands its footprint it will increasingly become vulnerable to fragmentation within the enterprise, unless all the elements can be unified and managed from a single control point.

One of the major benefits associated with virtualization is its ability to accommodate a flexible approach to workload management and service availability. However, this flexibility comes at a price, effectively adding a layer of abstraction that increases the complexity of managing the delivery of services dynamically. The market is still evolving, and as such is characterized by proprietary technologies that only have a rudimentary ability to support cross-platform interoperability. An often-overlooked aspect of managing virtual environments is the need for any management tool to operate at a more granular level than its physical environment counterpart. This more granular approach is further complicated by the need to holistically manage the server, network, client, user, and storage elements.

When the cloud computing revolution is added on to this already complex environment it can quickly be seen that orchestration becomes the new fulcrum for management and control. This fulcrum is now at the center of a federated and fragmented IT supply chain, where applications, services, and infrastructure are separated by location and ownership. While the nirvana of the cloud world is for any workload to execute in any location on any platform, the reality is that the different standards make this currently something that is only possible between technologies that have established working relationships.

KEY FINDINGS

- Ovum's technology capability evaluations show that BMC and HP are clear leaders with strong results, while CA Technologies, IBM, and VMware also scored well, giving a total of five vendors classified in the technology capability leaders category.

- Ovum's execution evaluations showed that only HP and Dell were classified in the leader category, with eight vendors being classified in the challenger category.
- Lifecycle management was the technology capability feature that showed the biggest variation between vendors.
- Ovum's market impact evaluation identified Microsoft, VMware, and Dell as leaders, mainly due to the combination of revenue growth and market segmentation.
- All vendors in the report showed a consistent level of agreement in terms of their maturity with the average being over four years in the market.
- Ovum identifies infrastructure modeling and analysis as a key area of improvement for all vendors.

VENDOR SOLUTION SELECTION

METHODOLOGY

Technology analysis

Vendors were invited to complete a virtualization and cloud management features matrix, a comprehensive spreadsheet listing product features Ovum believes are required and desirable in a virtualization and cloud management solution. However, because the coverage is so broad Ovum does not compare a single product in this Ovum Decision Matrix, but instead compares the vendor's capability across all its products in the virtualization and cloud management space. The features matrix is a comprehensive technology questionnaire developed by Ovum analysts containing hundreds of different criteria. Ovum then applied weights to these entries by individual row and by section based on the importance of each criterion. The final ranking of vendors in the Ovum Decision Matrix for Virtualization and Cloud Management 2013-14 technology dimension is based on the scores vendors achieve from this analysis.

The criterion for a vendor to answer yes to a feature is that it must be available out-of-the-box in any product within its range of products that are applicable to cloud and virtualization management. A third-party provider, custom integration, or partnership is not sufficient to merit a "yes." All vendors were made aware of this prior to completion of the questionnaire. Prior to the publication of the report vendors were given the opportunity to review their submissions again to ensure there were no discrepancies.

OVUM RATINGS

- **Leader:** This category represents the leading solutions that we believe are worthy of a place on most technology selection shortlists. The vendor has established a commanding market position with a product that is widely accepted as best-of-breed.
- **Challenger:** The vendors in this category have a good market positioning and are selling and marketing the product well. The products offer competitive functionality and good price-performance proposition, and should be considered as part of the technology selection.

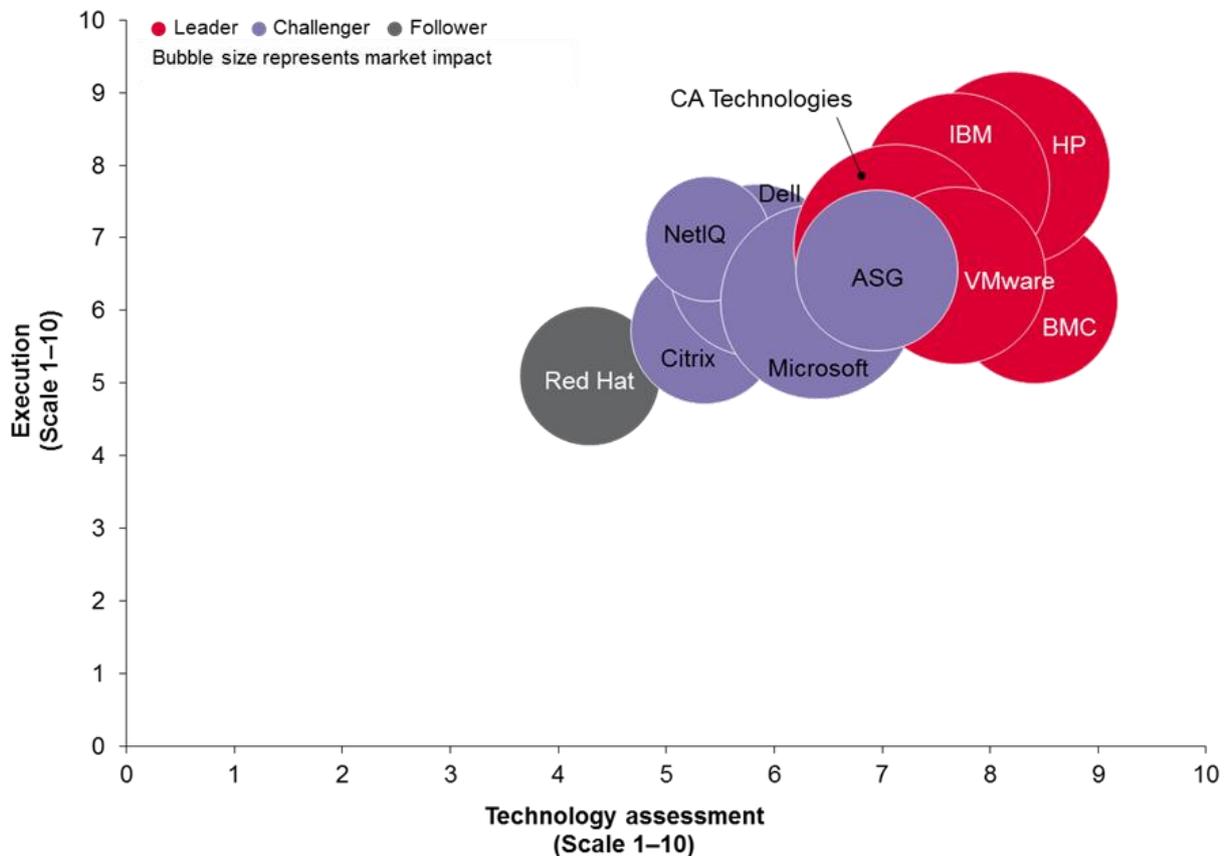
- Follower: Solutions in this category are typically aimed at meeting the requirements of a particular kind of customer. As a tier-one offering, they should be explored as part of the technology selection.

MARKET AND SOLUTION ANALYSIS

OVUM DECISION MATRIX FOR VIRTUALIZATION AND CLOUD MANAGEMENT 2013

The Ovum Decision Matrix provides a summary of the market standing of the major virtualization and cloud management vendors based on a quantitative assessment of their technology capabilities, market impact, and ability to execute. It provides vendor selection guidance for enterprises looking to deploy virtualization and cloud management solutions and advises them on whether a vendor should be shortlisted, considered, or explored further. The Ovum Decision Matrix is a three-dimensional chart representing vendors' scores in technology, market impact, and execution. Technology scores are represented on the x-axis and execution scores on the y-axis. The size of the bubble represents market impact score relative to the market leader. This edition of the Ovum Decision Matrix includes 11 vendor solutions.

Figure 1: Ovum Decision Matrix: Virtualization and Cloud Management 2013



Source: Ovum

Table 1: Ovum Decision Matrix: Virtualization and Cloud Management 2013

Market leaders	Market challengers	Market followers
BMC	ASG	Red Hat
CA Technologies	Citrix	
HP	Dell	
IBM	Microsoft	
VMware	NetIQ	

Source: Ovum

MARKET LEADERS: BMC, CA TECHNOLOGIES, HP, IBM, AND VMWARE

The market leaders BMC, CA Technologies, HP, IBM, and VMware all scored an average of over seven out of ten across all three dimensions, with HP being the clear leader with an average of 8.04, the separation between second and fifth in the leaders was very narrow, at just over 0.5 points. This group also recorded an average of five category leading scores across all the categories compared to the whole group average of four, demonstrating that the leader category was consistently above average. The leaders all shared one key attribute; namely, all five were the only five vendors in the technical features dimension (shown on the X axis) to score an average of over seven out of ten. It should be noted that the performance of these vendors in the other dimensions (execution and market impact) was less clearly defined and therefore provides opportunity for the challengers to target developments so as to close in to, or even overtake, the current leaders.

MARKET CHALLENGERS: ASG, CITRIX, DELL, MICROSOFT, AND NETIQ

The market challengers ASG, Citrix, Dell, Microsoft, and NetIQ were separated by just over 1.0 point and were a mixture of vendors with some strong categories and others that were comparatively weak; ASG, for example, recorded six and NetIQ five category leading scores. The other group of vendors demonstrated a performance that was consistently in-line with the whole group average; Microsoft and Dell only recorded three category leading scores, and Citrix one, for example. Ovum considers that any of the vendors in this category have the potential to become a market leader, but to do so they must either address the capability gaps, or improve their overall performance in-line with scores achieved by the market leaders. Overall the challengers were nearly one point on average behind the leaders, but were 1.5 points above the average follower's scores, so are definitely positioned in the middle grouping, and clearly show the market remains a three-tier market.

MARKET FOLLOWERS: RED HAT

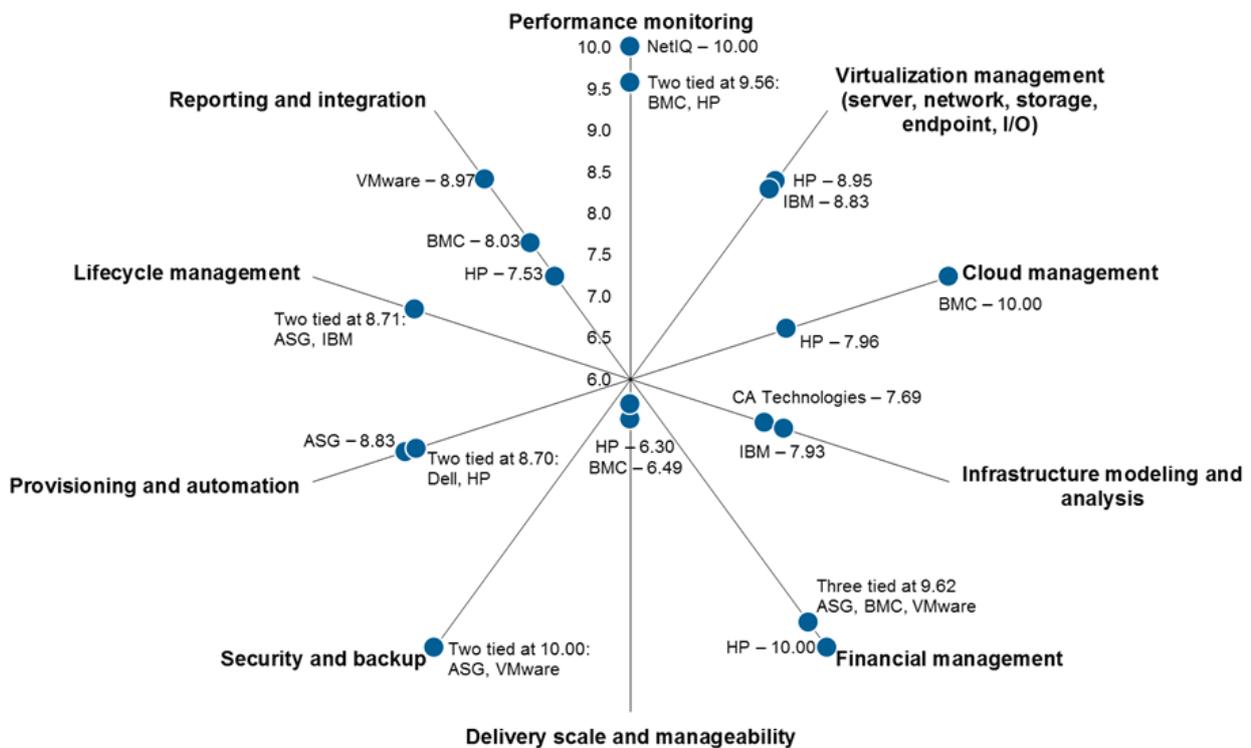
The market followers in the Ovum Decision Matrix: Virtualization and Cloud Management 2013-14 report are Red Hat. Ovum considers Red Hat to have some excellent features and strengths but they lack the comprehensive capabilities across all categories, and this was demonstrated by

the fact that Red Hat scored only one category leading scores, compared to the whole group average of four. Ovum recognizes that Red Hat is developing their solution sets in this market. However, overall they scored an average of just below five out of ten, which was over 1.5 points below the whole group average of 6.67.

MARKET LEADERS

MARKET LEADERS: TECHNOLOGY

Figure 2: Ovum Decision Matrix: Virtualization and Cloud Management 2013 Market leaders – technology



Source: Ovum

In the technology features dimension BMC and HP were the clear leaders with both scoring an average of over eight out of ten and both being the only two vendors to score every category within the dimension above the category average. VMware and IBM complete the leader's category both averaging just above 7.6 for the technology features dimension. There were only six vendors that recorded category leading scores, and four (BMC, HP, IBM, and VMware) were overall leaders as well as technology features dimension leaders. However, ASG recorded three category leading scores and NetIQ one. This dimension also saw four maximum scores for NetIQ

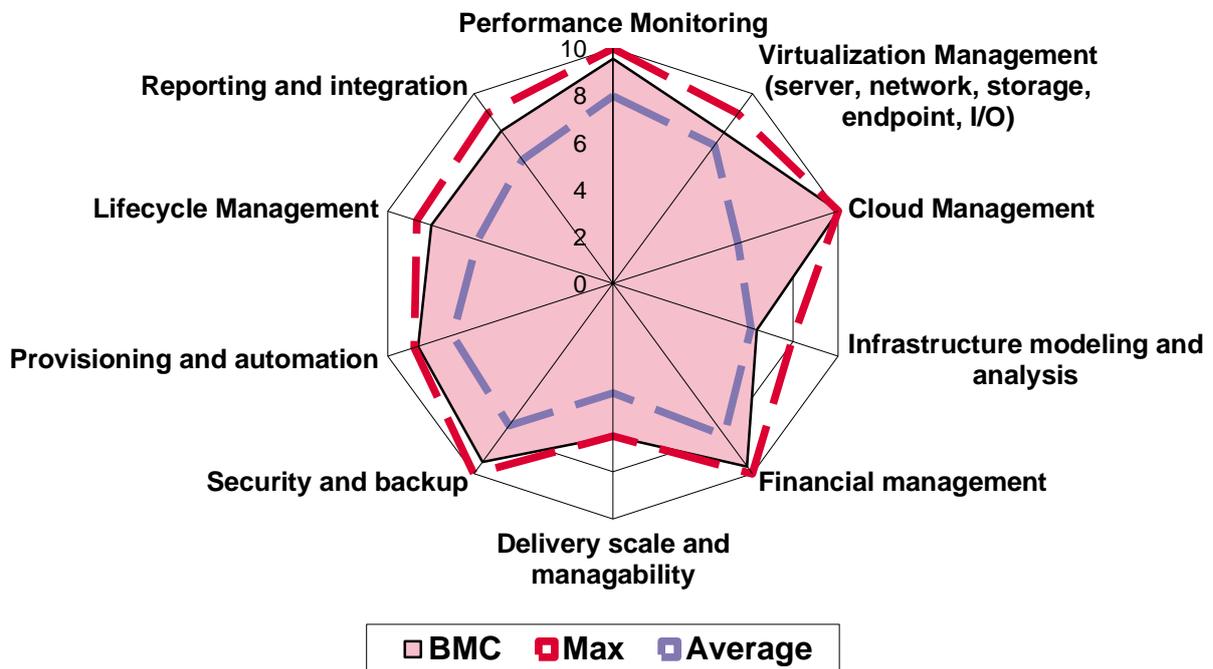
in performance monitoring, HP in financial management, and ASG and VMware for security and backup.

VENDOR ANALYSIS

BMC: OVUM RECOMMENDATION – LEADER

Figure 3: BMC technology radar

Technology radar



Source: Ovum

Ovum SWOT Assessment

Products part of this evaluation

BMC Cloud Lifecycle Management, BMC Cloud Operations Management

Strengths

BMC is the clear leader in the features dimension, and while it only scored three leading scores in all the individual categories, two of these were in the features dimension. While BMC does provide the ability to integrate and apply analytics to energy-related data today, they do not currently support VM power and environmental modeling and analysis out-of-the-box (directly or through third party solutions), which resulted in a lower score in this category. Since the market is not yet mature, BMC intends to continue to evaluate and possibly address these capabilities in the future. BMC's second lowest score in the features dimension was in delivery, scale, and manageability, but this was the sector's leading score so cannot be considered as a weakness. BMC scored a maximum in the cloud management feature, which demonstrated the breadth of

integration BMC has with public cloud platforms as well as private cloud technologies. Ovum considers this feature will become of increasing importance, particularly as we do not expect a single cloud standard to be agreed within the short to medium term, if ever.

Weaknesses

BMC's area for improvement is in terms of infrastructure modeling and scenario. While its performance was solid analysis (see strengths), it was nearly two points below the leader's score. BMC's weakest dimension was execution where on average it was over two points behind the dimension leader.

Opportunities

BMC compared to its main rivals demonstrated an average execution capability, which was supported by the fact it did not score any leadership scores, or any category lowest scores in the execution dimension. However, BMC's average score for the execution dimension was slightly below the average for all vendors by 0.5 points. Market impact was another solid performance, with one leadership score in terms of revenue growth and a slightly above average total score (approximately 0.4 points). BMC recently moved from a public company to a private company and this Ovum believes will allow it to develop its solutions with a more long-term vision, but Ovum is waiting to hear what BMC's new owners plans are for the company going forward.

Threats

While BMC did not obtain many individual category leadership scores its overall performance was one of a solid, all-round capability. BMC excelled in the features dimension where it was the clear leader with an average score of 8.41 out of 10, and two individual category leading scores (out of ten in total). BMC's performance in execution and market impact was less spectacular and more in-line with the average. However, on balance BMC has been categorized as a leader because it provided two solid dimensions and one clear leadership dimension. Ovum considers that BMC must be mindful that execution and market impact represent the biggest threat to its leadership position in future ODMs.

APPENDIX

AUTHOR

Roy Illsley, Principal Analyst, Software

roy.illsley@ovum.com

OVUM CONSULTING

We hope that this analysis will help you make informed and imaginative business decisions. If you have further requirements, Ovum's consulting team may be able to help you. For more information about Ovum's consulting capabilities, please contact us directly at consulting@ovum.com.

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COMPANY PROFILE

Table 1: Contact Details	
Source:	OVUM

Ovum's Knowledge Centers are new premium services offering the entire suite of Ovum information in fully interactive formats. To find out more about Knowledge Centers and our research, contact us:

Ovum Europe
Mortimer House
37-41 Mortimer Street
London W1T 3JH, UK
+44 20 7551 9000
crmgroup@ovum.com

Ovum Australia
Level 5, 459 Little Collins Street
Melbourne, VIC 3000
Australia
+61 3 9601 6700

Ovum New York
17 State Street, 32nd Floor
New York
NY 10004, USA
+1 212 686 7400

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