

Symantec Data Center Foundation Challenges Enterprise IT Infrastructure Management Industry Status Quo

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For many years, HP, IBM, CA and BMC, the four horsemen of enterprise-class IT management, have dominated the market for serving large, complex data center management requirements. While start-ups and pure plays have nipped at their heels from time to time, few have offered a comprehensive suite that would challenge the four horsemen's market dominance.

Increasingly, however, major software ISVs looking to extend product and revenue profiles are attacking this foursome. One of the more formidable challenges arrived on May 9, 2006 with Symantec's launch of Data Center Foundation. The Data Center Foundation integrates and centralizes the administration of a number of existing, well-regarded Veritas storage management products while aggressively expanding Symantec's server management footprint.

The Data Center Foundation strategy is a suite of integrated solutions including an infrastructure platform (i.e. common consoles, sign-on and installation/provisioning processes, license management, workflow engines, business analytics and user interfaces). Veritas NetBackup, Veritas Storage Foundation, Veritas Server Foundation, and Veritas i3, form the four infrastructure solutions that comprise Symantec's Data Center Foundation strategy. It is a hardware agnostic software suite that works with most Unix, Linux and Windows operating systems. It will enable data center operators to apply policies and task-level automation consistently across all managed systems as well as reduce the number of management consoles needed to operate core data center infrastructure systems and processes. It will also allow operators to treat heterogeneous systems as pools of resources when activating back-up, storage and server provisioning, configuration and workload management tasks.

Interestingly, while Symantec recently acquired a CMDB via its Relicore purchase, the company stresses that it does not want to be in the framework service desk business. It positions the Veritas Configuration Manager technology (which is built on the Relicore Clarity product) as its discovery and dependency mapping engine and the data repository for the DCF environment. As a result, Symantec expects to send data to other enterprise frameworks and analytics engines but does not expect to need to take in substantial amounts of data from third party systems.

Symantec aims to become a major player in the operation and protection of infrastructure hardware and software resources in the following ways:

- Capacity management;
- Configuration management;
- Security management;
- Availability management; and
- IT service continuity.

It does not aspire, at this time, to address many other important ITIL processes such as service level tracking or end-to-end problem management and resolution. It is also not aspiring to address IT governance issues related to the alignment of IT resources with business priorities or SLAs.

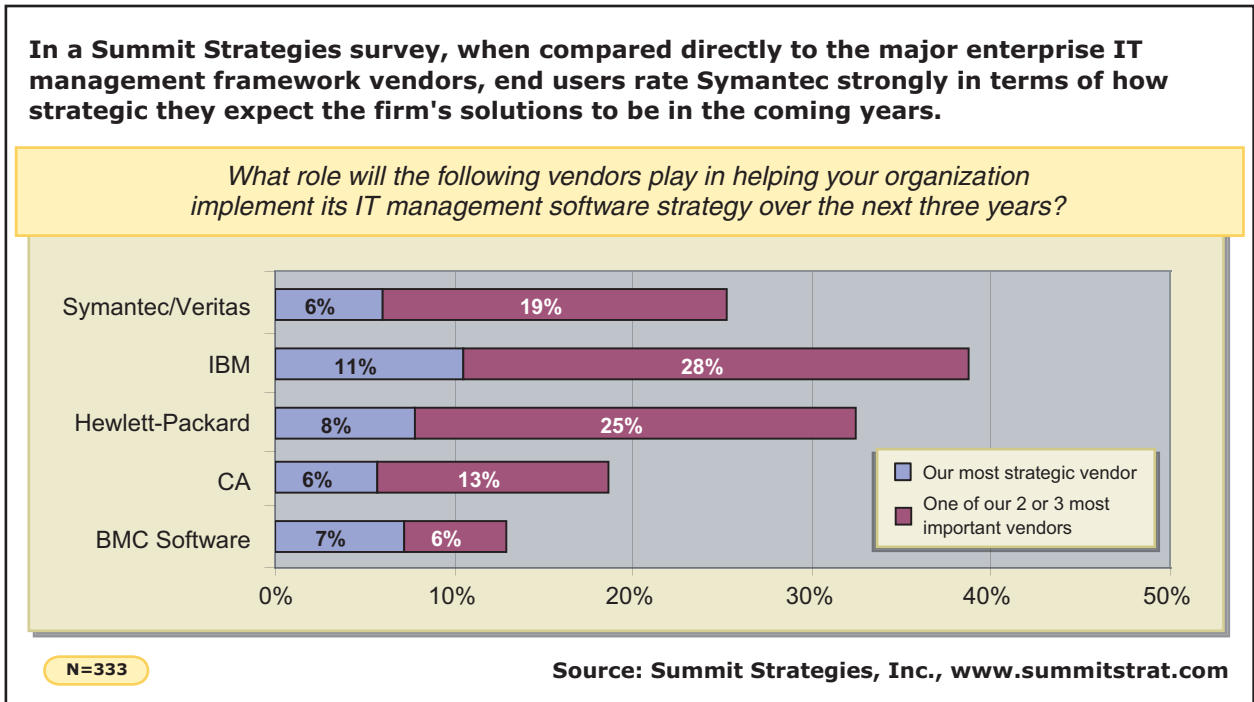
Essentially, Symantec is offering customers a migration path for reducing the clutter of disparate, loosely connected infrastructure management tools that currently litter many data centers. Symantec promises that customers will be able to replace dozens of different point solution tools if they choose to migrate to and standardize on the Data Center Foundation management environment.

General availability is planned for Q3 2006. Data Center Foundation will be available on a modular basis via both direct and indirect channels. Aggressive license and pricing programs are designed to promote a "try-and-buy" sales strategy. Specifically, under the Storage Foundation Basic program the host side license will be available for free for management of edge and web devices. The core Data Center Foundation license will range from \$1,000 to \$20,000 annually depending on the number of attached servers. By constraining the Data Center Foundation's scope to infrastructure operations, and emphasizing tight integration across all management components, Symantec is positioning itself as the antidote to loosely coupled framework-based solutions. Our end-user surveys of enterprise and mid-market customers consistently show customer's rating the long term strategic role of Symantec/Veritas IT management software solutions running neck-in-neck with offerings from several of the more traditional enterprise IT management ISVs, even before the firm began offering an integrated manage-

ment software solution (see Figure). We expect that many upper end mid-market customers as well as enterprise accounts will seriously look at these new offerings, although adoption is likely to initially focus on unifying existing Symantec storage and security tools and then extend slowly over time to embrace server management activities as well.

Data center managers consistently tell us that they value the ability of new products to leverage existing assets and investments. As a result, we don't expect Data Center Foundation to displace the major frameworks anytime soon but we do see Symantec putting pressure on new incremental sales by the major framework vendors going forward. Whether Symantec can get the Data Center Foundation toolkit baked in as native server and storage management tools that are shipped by one or more major systems vendor remains to be seen. If the firm is able to pull off a comprehensive OEM coup its ability to become a major IT infrastructure vendor will be significantly enhanced. ▀

Figure: Enterprise and Mid-Market Customers Identify Strategic IT Management Software Vendors



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