Morpheus Data extends self-service IT delivery to a range of personas

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Introduction

Morpheus Data continues to extend the scope of its hybrid cloud application orchestration platform to enable self-service IT. As enterprises refocus their priorities, the company is increasing the release cadence for its platform, as well as the volume of new features and updates, adding more than 80 in the recently released 4.2.x version, versus 70 in the previous release.

451 TAKE

Targeting different personas (developers, IT/cloud operations, business) enables Morpheus to 'land and expand' across enterprises, using what it characterizes as 'hybrid cloud application orchestration' as a connective channel between them. We see the use of DevOps processes increasing the alignment between different groups within enterprises, which may not be hard-wired to the same projects (or even self-identify as DevOps), but are nonetheless on the same cloud-native direction of travel, with the same strategic goals. Morpheus remains a strong, independent player in a field that is consolidating on a weekly basis. Given a key constraint in cloud native is access to talent (see figure below), Morpheus is an approach that can help upskill customers.

Personas

To increase its suitability for use across an organization, Morpheus has built out features and functions targeting FinOps, SecOps, CloudOps and DevOps personas that deliver self-service capabilities aligned to what each role needs to accomplish and what outcomes they need. It provides single-click provisioning of preconfigured and locked-down catalog items.

Product updates

Because teams and applications are much more distributed in multicloud environments, it's harder to secure the larger attack surface that results. While a zero-trust security model addresses threats from all sides, micro-segmentation of the network with granular policy management is required. To achieve this, Morpheus has targeted SecOps teams with the integration of VMware NSX-V and NSX-T, as well as Unisys Stealth technology, enabling micro-segmented networks and objects to be created, managed and consumed dynamically at provision time. For VMware NSX-V and NSX-T, its customers can manage transfer zones, distributed firewalls, edge gateways and load balancers from Morpheus, and securely share these network objects in multi-tenant environments. Unisys Stealth uses identity-driven micro segmentation and creates communities of interest with communication channels between members based on trusted identities. Morpheus can create, manage, and synchronize roles and communities, and can assign Stealth configuration information at provision time.

For the DevOps persona, the company recently introduced a Morpheus Terraform Provider for infrastructure-as-code in on-premises environments. For organizations embracing Kubernetes, it extended its built-in cluster management capability to include integration with existing brownfield Kubernetes deployments, connections to the Azure Kubernetes Service (AKS) and Amazon Elastic Kubernetes Service (EKS), and updates to the latest K8 releases for its own CNCF-certified Morpheus Kubernetes Service.

The release also expands Morpheus' GitOps capability for developers – it can now dynamically version automation tasks via integration into any Git or GitHub repository. This includes Ansible, Python, Groovy, Shell, PowerShell, jRuby and email-based tasks. Tasks can be chained together as phase-based workflows attached to provisioned instances or used to programmatically manage day-two operations on an ad hoc or scheduled basis.

Morpheus' user interface has also been updated for FinOps, enabling business users to create custom views of application instances across clouds, as well as to export custom datasets into CSV or JSON for additional analysis, including chargeback, showback, project reporting and more. Navigation has been streamlined with updates to global search, navigation and granular sorting of tabular data. It has also increased its cloud integrations in this release and expanded Morpheus tag synchronization, management and continuous tag compliance to now include GCP. It can now synchronize real-time cost data for all Oracle cloud instances and cloud resources to provide multicloud cost management.

Other technology integration enhancements include the ability to separate a single Microsoft SCVMM cluster into multiple private or multi-tenant clouds. It also offers new support for Amazon Linux 2 and Red Hat Linux 8.x; SUSE Linux has been added to existing support for Debian, RHEL 7.x and Ubuntu. It has also extended ServiceNow integration to present full multi-tier app blueprints as native catalog items within SNOW on top of existing instance catalog, CMDB, approval and incident management.
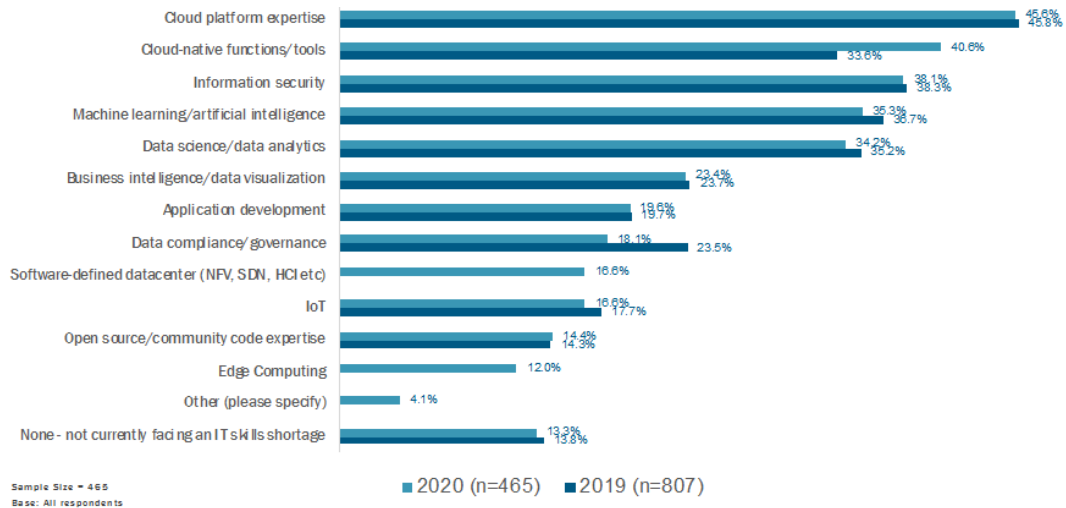
What's next? We expect Morpheus to continue to go deeper in its persona-based cloud management strategy with new capabilities for the wide variety of stakeholders in increasingly complex hybrid and multicloud environments.

Business model

Morpheus' technology was originally an internal management mechanism at private equity firm Bertram Capital, which had scoured the market for the tools it required, and ultimately embarked on its own development effort. The tool was productized and spun into a wholly owned entity, Morpheus Data, which now has nearly 75 employees and over 150 customers outside of the Bertram portfolio, including AstraZeneca, American Express GBT, CenturyLink and QuickenLoans. It also has joint sales engagements with Hewlett Packard Enterprise and Dell Technologies, and is expanding relationships with large global systems integrators.

Ninety percent (90%) of revenue is channel-driven. It claims to have grown revenue by 3.5x in 2019 over the previous year, and another 50% year over year in the first six months of 2020. The company has doubled its headcount and now manages some 400,000 customer workloads. We estimate revenue to be well north of $15m. Channel partners include CDW, SVA, WWT, Trace3, SHI, Technologent and Pivot Technology Solutions. The buyer for Morpheus remains the cloud operations team, despite the increasing number of services and integrations that now support secure operations (SecureOps). Morpheus says that, due to the impact of COVID-19, it has more proofs of concept under way than ever; however, typical deal duration has been reduced to 12 months from 24-36 months as customers take a look at where the land lies at a more frequent cadence. Morpheus charges based on the number of application workloads under management across all attached clouds; it also provides a free community edition.

Enterprise IT Skills Shortages

Bar chart data:

- Cloud platform expertise: 45.6% (2020), 45.8% (2019)
- Cloud-native functions/tools: 40.6% (2020), 33.6% (2019)
- Information security: 38.1% (2020), 38.3% (2019)
- Machine learning/artificial intelligence: 35.3% (2020), 36.7% (2019)
- Data science/data analytics: 34.2% (2020), 35.2% (2019)
- Business intelligence/data visualization: 23.4% (2020), 23.7% (2019)
- Application development: 19.6% (2020), 19.7% (2019)
- Data compliance/governance: 18.1% (2020), 23.5% (2019)
- Software-defined datacenter (NFV, SDN, HCI etc): 16.6% (2020)
- IoT: 16.6% (2020), 17.7% (2019)
- Open source/community code expertise: 14.4% (2020), 14.3% (2019)
- Edge Computing: 12.0% (2020)
- Other (please specify): 4.1% (2020)
- None - not currently facing an IT skills shortage: 13.3% (2020), 13.8% (2019)

Sample Size = 465
Base: All respondents

■ 2020 (n=465) ■ 2019 (n=807)

Source: 451 Research's Voice of the Enterprise: Digital Pulse, Organizational Dynamics 2020
Q. In which IT categories is your organization currently facing an acute skills shortage?

Competition

Cloud management platform vendors include HPE, Micro Focus Hybrid Cloud Manager, Broadcom Cloud Service Management, BMC Cloud Lifecycle Management, DXC Technology Concerto, Accenture Cloud Platform, Capgemini Cloud Choice, Atos Canopy, Fujitsu Cloud Services Management, NTT CMP, Cisco CloudCenter, Oracle Management Cloud, Hitachi Vantara, IBM Cloud Management, Red Hat CloudForms, Microsoft Operations Management Suite, VMware vRealize, AWS Cloud Management Tools, Google Stackdriver, Alibaba Cloud Monitoring & Management, ServiceNow Cloud Management, CenturyLink Cloud Application Manager, Tech Mahindra Cloud Aggregation Platform, Wipro ServiceNXT, Cognizant Cloud360, HCL DRYiCE Mycloud, Infosys Managed Cloud Platform, and TCS Consult and Architect.

Independent multicloud and hybrid IT management vendors include Flexera RightScale, Apptio FittedCloud/Cloudability, Scalr, CloudBolt, CloudSphere (HyperGrid), CloudCheckr, CloudGenera, Rapid7 DivvyCloud, Snow Software, Turbonomic/ParkMyCloud, Trianz, Abiquo, Platform9, Quali, InContinuum and Densify.

SWOT Analysis

STRENGTHS

Morpheus is supporting customers it sees at every stage of maturity – whether rehosting infrastructure to cloud, re-platforming (across on-prem and off-prem cloud) or rebuilding applications (CI/CD, containers) – and claims to be growing quickly even in these uncertain times.

WEAKNESSES

The market remains very fragmented, with customers facing a massive amount of vendor options for cloud management and automation across the spectrum of operations and development. The key to success will be finding the right combinations and operationalizing them to deliver the benefits as advertised by their suppliers – speed, scale, agility and cost.

OPPORTUNITIES

Remaining an independent cloud management platform vendor is all about adjacency: expertise in secure, automated and self-service cloud management tasks, plus value-added capabilities that help customers navigate the operations and development journeys of cloud transformation and cloud native, respectively. As it increases the volume and velocity of service delivery, Morpheus Data is now also packaging its capabilities for specific user personas.

THREATS

Efficiency, security, and automation are now more important than ever as organizations reframe priorities for the rest of the year. We expect that the COVID-19 impact on cloud-native technologies will end up, in aggregate, to be positive. Cloud sits strategically at the top of the list of IT technologies viewed as most transformative, and any work in progress is prone to acceleration, not retrenchment, for those for whom the short-term negatives of COVID-19 can and will be absorbed. The C-suite points to cloud native as a weapon it will bring to the fight against variables such as uncertainty and rapidly changing market conditions. This viewpoint was born prior to COVID-19, which brings all those variables in spades.