

REPORT REPRINT

Morpheus Data looks to unify multi-cloud and container management

OCTOBER 25 2019

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Introduction

Morpheus kicked off the second half of 2019 by introducing major updates to its cloud management platform. Morpheus V4 capabilities are focused on providing customers with more freedom and faster deployment in multi-cloud and container automation. The company believes it is unique in offering an enterprise-grade unified multi-cloud and container management platform that supports more than 20 on-premises and public clouds. According to recent 451 Research survey results, 90% of responding enterprises plan to standardize on Kubernetes over the next few years, and 62% are pursuing a hybrid IT approach that integrates on- and off-premises cloud resources – see Figure 1.

451 TAKE

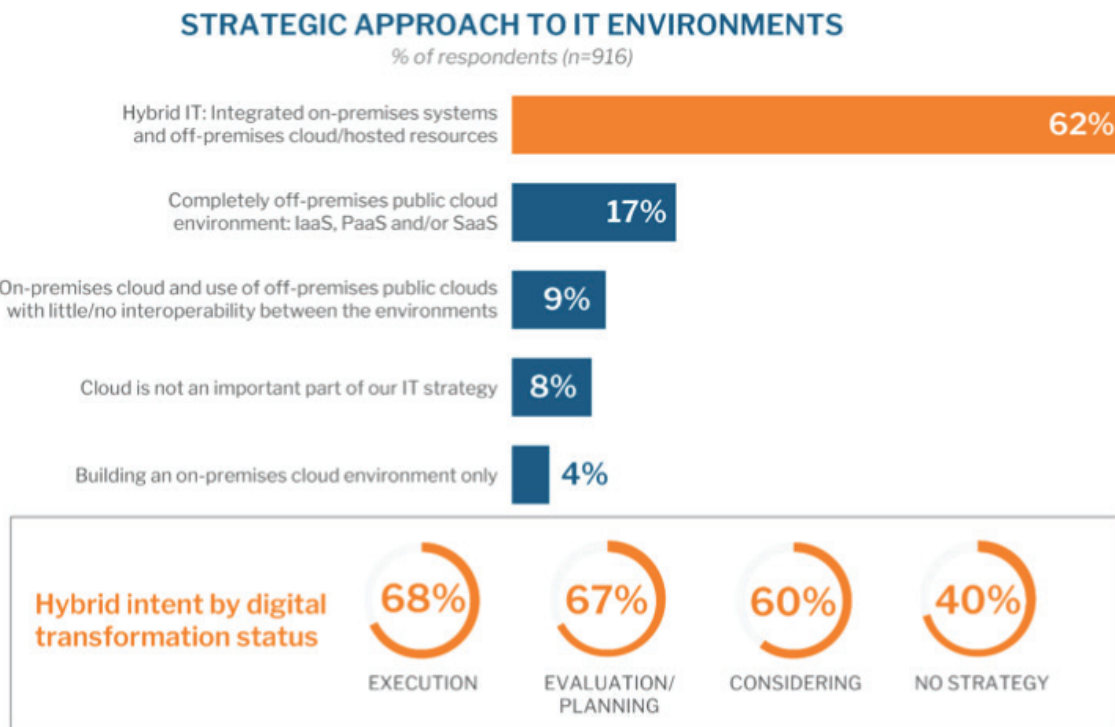
With enterprises at different stages of their journeys to hybrid IT and DevOps, operations-centric and developer-centric capabilities are required to support the different modernization motions underway – see Figure 2. Multi-cloud is the preferred strategy among enterprises, and hybrid IT environments have become design points. That's the infrastructure view. Cloud-native (aka Kubernetes, containers, microservices) is the application view, and DevOps is the primary implementation process for these. Modern management approaches must accommodate multiple types of infrastructure, modalities and levels of abstraction, in addition to different build, consume and manage models within the same toolbox. Following a blush of M&A in the sector, Morpheus Data is one of the few remaining independent 'full service' cloud management vendors extant and is building out its platform to support the range of different capabilities and user/buyer personas here.

Technology

Morpheus V4 enables customers to build, manage and utilize Kubernetes clusters while managing hybrid-cloud Kubernetes with a fully managed (and CNCF-certified) Morpheus Kubernetes Service. It believes this also reduces the risk and cost of using Ansible, and eliminates dependence on Ansible Tower by providing secure Ansible integration.

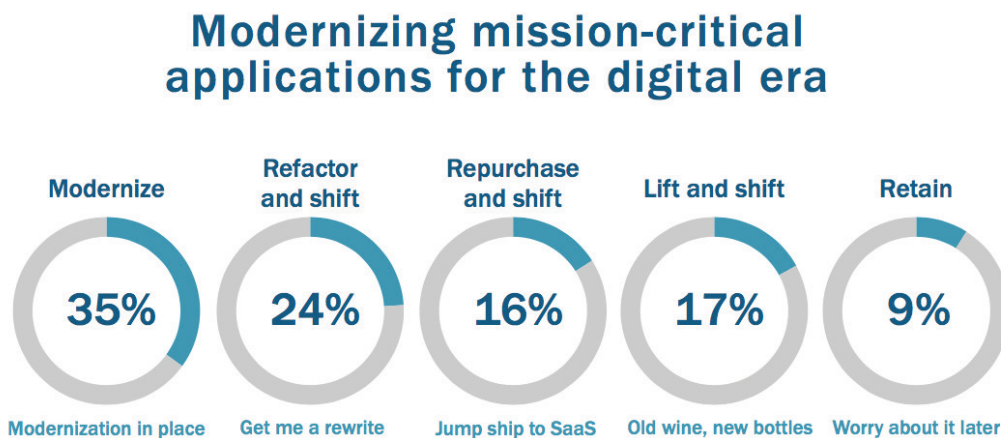
For IT teams finding the shift to containers operationally challenging, Morpheus believes V4 makes Kubernetes as operationally simple as VMware. Morpheus V4 includes an embedded and fully managed Morpheus Kubernetes Service. In addition to its own Kubernetes distribution, Morpheus enables users to deploy customized stacks and access public cloud Kubernetes services from AWS, Azure and Google. It believes this enables enterprises to standardize and automate the provisioning of application stacks on bare-metal servers, virtual machines or Kubernetes clusters – no matter where those resources are located. V4 enables customers to share and govern resources with role-based access controls; federate management of Kubernetes across on-prem and public cloud clusters; reduce cost of scale with built-in analytics and resource optimization; operate Kubernetes with built-in auditing, monitoring and logging; and automate application provisioning as code via Morpheus or HELM templates. The Morpheus Kubernetes Service is CNCF-validated.

Figure 1: Which of the following best describes your organization’s overall IT approach and strategy?



Source: 451 Research’s Voice of the Enterprise: Digital Pulse, Budgets & Outlook 2019

Figure 2: Which of the following best describes your organization’s overall IT infrastructure approach to mission-critical legacy apps and workloads going forward? (n=881)



Source: 451 Research’s Voice of the Enterprise: Digital Pulse, Workloads & Key Projects 2019

Ansible

Morpheus believes V4 simplifies and secures Ansible without the need for Ansible Tower by providing out-of-the-box integration with Ansible and Ansible Tower, and enhances Ansible beyond native capabilities, providing features that can eliminate the need for Tower. Ansible can now be configured to run over the Morpheus secure agent communication bus, allowing playbooks to be applied to instances where SSH/WinRM access may not be feasible due to security constraints. This integration supports Linux and Windows, and can also be configured to query secrets from the Morpheus Cypher service (similar to HashiCorp Vault). It can view real-time job status updates and detailed debug-level log output; execute phase-based and operational workflows using multiple playbooks; and apply governance, auditing and reporting across more than just Ansible. It also has direct integration into ITSM, IPAM, DNS, load balancers and more.

Other enhancements

The new Morpheus Jobs engine enables self-service automation of tasks against local or remote targets. Similar to utilities such as vRealize Orchestrator and Rundeck, this feature provides the ability to simplify day-two operations, such as user, infrastructure and patch management. Morpheus Jobs can execute on a scheduled or ad hoc basis using any task type, including Bash, PowerShell, http, Ansible, Chef, Puppet, Groovy, Python, JRuby and JavaScript.

Morpheus has also enhanced Microsoft support for large-scale SCVMM-based on-prem clouds. It has added support for VMware Integrated OpenStack to vSphere, ESXi and VCD; 'Nutanix Ready' certification plus enhanced discovery, hypervisor console access and Windows automation; and ITSM integration for BMC Remedy and Cherwell to existing certified ServiceNow support.

Morpheus has expanded its cost-optimization capability and bundled it into the platform – customers no longer want to pay a separate license charge for this. It includes new policy for budgets, granular reporting and filtering, and better accuracy for AWS and Azure.

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 more than 50 employees and over 100 customers outside of the Bertram portfolio, including McDonald's, BlackRock, QuickenLoans and AstraZeneca. It also has joint sales engagements with Hewlett Packard Enterprise, and is expanding relationships with large global systems integrators. Ninety percent (90%) of revenue is channel-driven, and we estimate revenue to be well north of \$10m. Channel partners include Computacenter, WWT, Trace3, SHI, Technolgent and Pivot Technology Solutions. Key target sales plays with partners include self-service provisioning with ServiceNow hooks; CI/CD enablement via configuration management integration; competitive take-outs of unused vRealize Automation and Cisco CloudCenter; cloud overlay for converged and hyperconverged offerings, such as Nutanix or Dell vxRail; and bare-metal server integration for Cisco UCS and HPE Synergy.

Competition

Cloud management platform vendors include HPE OneSphere, Huawei CMP (FusionBridge), Micro Focus Hybrid Cloud Manager, CA 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, 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, BT Compute Cloud Manager, 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 multi-cloud and hybrid IT management vendors include Flexera RightScale, Apptio FittedCloud/Cloudability, Scalr, Rackn, CloudBolt, HyperGrid, CloudCheckr, CloudGenera, DivvyCloud, Cloudify, Embotics, Turbonomic/ParkMyCloud, Trianz, Abiquo, Platform9, Quali, InContinuum, Densify and Appcara.

SWOT Analysis

STRENGTHS

With the breadth of cloud goods and services available in the market, the key to success will be finding the right combinations and operationalizing them to deliver the benefits being advertised by their suppliers. Users are spoiled for choice with the range of options now available. Morpheus is well positioned to support Kubernetes standardization and hybrid/multi-cloud adoption for consistency, portability and automation across hybrid infrastructures.

WEAKNESSES

Cloud management has become very complicated because of the jumble of clouds, containers and venues. Ensuring cloud works 'as advertised' to deliver the benefits of speed and scale is getting harder. The question is whether Morpheus Data (and its owner) can invest and expand quickly enough to remain competitive over the long term, as newer and bigger players enter the market. IBM is not the only company to bet the future of its business on being the destination for hybrid and multi-cloud management.

OPPORTUNITIES

Re-platforming to hybrid IT and multi-cloud developer-centric approaches, the makeover to cloud-native platforms, the imperative of cost-optimization tools, and the expansion of hyperscalers' own native management platforms are driving the cloud management platform market opportunity. Enterprises want agility, but skill gaps and technology silos are significant impediments. In bringing together VM automation, multi-cloud management, and Kubernetes service delivery in a unified platform built for Dev and Ops, Morpheus is aimed to help accelerate business transformation.

THREATS

This market has ignited on the industry re-platforming to hybrid IT, multi-cloud and cloud-native. Morpheus Data is now battling with most of the major vendors, IT services companies and cloud service providers (many recently emboldened with acquisitions), as well as DIY approaches.