



Market Roundup

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Storage to the People! EMC Announces Online ControlCenter Capabilities

By Charles King

EMC has announced new online capabilities for the company's ControlCenter family of open storage management solutions. The online access and subscription-based software offerings provides customers direct, Web-based access to EMC's knowledgebases and intelligence engines, including the entire EMC E-Lab database of heterogeneous storage, server, and network interoperability metrics. According to EMC, the new capabilities offer an affordable way for customers to shorten problem isolation times, create and validate SAN designs, and benefit from current and historical data trending analysis. The new Web-based ControlCenter software offerings include EMC SAN Architect, a template-driven solution designed to guide storage architects and administrators through the design, modeling, and validation of fully functional SANs. Additionally, EMC AutoAdvice is an intelligence engine that analyzes data about current and historical application and infrastructure performance, helping customers to isolate current problems, identify future trouble spots, and recommend best practice solutions. SAN Architect and AutoAdvice can be used as stand-alone solutions or as extensions of EMC's ControlCenter application family. SAN Architect is available immediately as a one-year subscription with an entry-level list price of \$2,400. AutoAdvice is available immediately as a one-year subscription with pricing based per CPU beginning at \$400 and declining with larger installations.

At a time when IT vendors of every stripe are trying to evolve service delivery products and strategies, it behooves us to ask just what an IT service really is. Does it consist of a subtle blend of IT expertise and enterprise acumen, stirred lightly with business integration skills; or is it simply a means to sell more stuff to already over-provisioned customers? Is it a way to raise the technological sophistication and comfort zones of enterprises that have come to rely increasingly on IT solutions to business problems, or is it a way to push the jargon level up a notch or three so that customers remain essentially system-ignorant and supplier-dependent? The answers to these question lie all over the map and vary from vendor to vendor, but it seems to us that EMC's new ControlCenter offerings posit an approach customers are likely to find refreshing. By providing SAN Architect to ease storage network design and deployment chores, EMC is giving clients a way to become less dependent and more autonomous in developing and controlling their storage networks. By delivering AutoAdvice as a first line of defense for IT staff who monitor the flow of data through company infrastructures, EMC is offering a means for enterprises to ensure the availability business-critical information. However, the benefits do not flow just one way. By becoming a trusted purveyor of storage intelligence, EMC stands to gain by increasing the company's stature among its clients and through leveraging a store of information that took many years and dollars to develop. If power and knowledge really are

interchangeable, EMC's new ControlCenter offerings aim to place power directly into the hands of the company's enterprise clients, and constitute a strategy that should pay dividends for both EMC and its customers.

Think

By Jim Balderston

IBM announced this week that it has acquired Think Dynamics, a Toronto-based vendor of software that automates the management of datacenter resources. Think has four products: ThinkProvision, ThinkAssure, ThinkRecovery, and ThinkUtility. Think Provision is the base of the system, and automates company practices and rules as designed. ThinkAssure provides management of resource capacity by responding to load spikes and making resource allocation adjustments. ThinkRecovery responds to application environment failures and provides a temporary application environment from a remote location and ThinkUtility monitors varying levels of application service and in conjunction with ThinkProvision executes provisioning based upon priorities associated with availability and resource cost. The Think Dynamics products are standards based, and designed to work in heterogeneous environments. IBM stated that the Think Dynamics offering will sit in the middle of the policy-based orchestration of its on demand computing environment and that it will be integrated into its existing products. Think Dynamics has been shipping products since February of 2002. Terms of the deal were not announced.

While Think Dynamics may be a low-profile player in the larger IT universe, it was becoming an increasingly well-known player in the growing field of what IBM calls autonomic computing. No less an authority than the now-defunct Red Herring Magazine called Think one of the hot emerging companies in 2002. Think was partners with both IBM and HP. In the middle of last year, some press reports noted that Think Dynamics, along with Terraspring, which was acquired by Sun in November, were two hot acquisition targets. Terraspring had been an HP partner, which used the company's technology in its Universal Data Center initiative.

By all accounts, this looks like a wise acquisition for IBM. Not only does the company get a piece of its automated provisioning and management package, it does so at the apparent expense of HP, which is for the time being at least, playing catch-up in the autonomic or self-managing software market. This also marks the second time in about half a year that a key element of HP's offerings has been bought by a competitor. First Sun nails down Terraspring, now IBM bags Think Dynamics. While no figures were announced in this deal, we suspect that the cost of acquiring this company was miniscule, especially when one considers the price IBM paid for Rational back in February. With only \$8 million in funding and about a year of actual product on shelves, we suspect that IBM did not have to lay out a large amount of money for this relatively new company. In that light, if Think Dynamic's products actually deliver on the promises that IBM has used to justify this deal, we believe it could be one of the most cost-effective acquisitions of the past couple of years. In short, IBM decided to think, did so, and thought of Think.

Blue Away Blown Away? Sun Announces 1,000th Mainframe Rehosting Win

By Charles King

Sun Microsystems has announced that it has acquired its 1,000th mainframe rehosting customer installation at Europ Assistance Group, which provides assistance services such as roadside service and home repair for the automobile, medical, and home care industries. According to Sun, Europ Assistance Group's Italian subsidiary is rehosting mainframe applications with Sun MTP and Sun MBM software on Sun UNIX servers, allowing the company to decommission its mainframe system. No specific details about which Sun hardware is being used in the project were included.

Public relations events have lifecycles like any other organism, and tend to perish quickly once the life-giving glare of the spotlight dwindles. Judging by the rhetoric of this press release, Sun timed the announcement to snatch or dim some of the light surrounding IBM's launch of its "T-Rex" eServer zSeries z990, the company's new flagship mainframe. Given that, we believe it is worth taking a closer look at the current state of

mainframe rehosting in particular and the mainframe market in general. Sun's efforts in this space follow a meandering trail, beginning with the company's acquisition of Critical Path's mainframe rehosting business in September 2001, in time to be featured in the launch of Sun's flagship Sun Fire 15K server. Eight months later rehosting became key to Sun's "Blue Away" initiative, which aimed to snatch IBM customers by moving their mainframe applications to Sun's "Midframe" Sun Fire 3800-6800 servers. In February 2003, Sun announced that mainframe rehosting and Wintel server consolidation were targets for its Sun Fire V1280 rack mounted servers. Sun's PR spin on the downward migration of mainframe rehosting through the Sun Fire food chain was that even its lower-end servers were robust and reliable enough to offer mainframe performance at a fraction of the price; however, we expect that a simpler explanation is closer to the truth. Traditional mainframe customers, who are among the most conservative of IT users, are as unlikely to replace a \$1 million mainframe with a \$1 million UNIX server as they are to entrust business-critical data to an uncertain solution. As a result, Sun's rehosting solutions are most likely to be considered by enterprises with modest mainframe needs or those who already have sizeable investments in and experience with the Sun platform.

So how does that reflect on Sun's Europ Assistance Group announcement? While the Italian subsidiary of a company that operates in 208 countries would seem to qualify as a classic example of a customer whose mainframe needs could be met with Sun's rehosted solutions, we find the absence of any mention of IBM or the Blue Away initiative, outside of a bit of dinosaur mayhem implied in the headline, somewhat puzzling. We wonder if it suggests that either the replaced mainframe was another vendor's or that Sun is stepping quietly away from Blue Away. In the greater scheme of things, does Sun's 1,000th customer win mean that mainframe rehosting is alive, well, and coming soon to a datacenter near you? Maybe, but more likely maybe not. The fact is that the mainframe market has changed considerably since Sun's leap into rehosting, largely due to IBM's willingness to actively rethink, retool, and revitalize its mainframe business. Last year's introduction of the eServer z800 "mini" mainframe and the company's later revision of the z800's minimum MIPS configuration should appeal to many of the smaller mainframe customers Sun is courting. Additionally, the On/Off Capacity on Demand elements of this week's z990 launch, along with IBM's plans to provide mainframe access through its On Demand datacenters, offer further alternatives to customers whose mainframe needs are modest or intermittent. Overall, the danger we see to Sun in all this is that by continuing to insist that mainframe solutions remain mired in prehistory, the company's opportunities in this space are likely to face eventual fossilization.

Check Point Adds another Layer

By Jim Balderston

Check Point Software has announced a new security software suite based on its firewall that will include intrusion detection capabilities to offer what the company said would be application-level security to its existing network level security capabilities. The Check Point Next Generation with Application Intelligence is designed to thwart the increasingly common attacks such as Code Red and Nimda worms, which can make their way through standard firewalls. The company said that the new product will be available in June and will carry an annual cost of \$1,000 per firewall and will be included in the company's Firewall-1 product going forward.

The Check Point announcement comes at a time when IT security vendors across the market are either acquiring or promising more fine-grained security screening products for the enterprise customers. Check Point's offering continues that trend, the company also has a valid claim with its offer to provide great integration with its existing – and market dominant firewall product. Other security vendors offering similar products will have to have an answer to the question of how well they will interoperate with the Firewall-1 product.

That being said, we believe that IT security is still in its infancy. To date, most enterprise IT security consists of what could be viewed as a big wall surrounding the enterprise IT assets. The wall has some gates for access; these gates are guarded with increasingly sophisticated locking mechanisms to which specific and increasingly difficult-to-copy keys are required. But despite the improvements in the gate management technology, the

simple fact remains that the prime value of a firewall is that it is a wall. We believe that in the coming years more intelligent, proactive, self-minding, and responsive security products are going to make their way into the marketplace. Just as we are seeing the idea of more intelligent computing models being offered in the realm of resource management, diagnostics, and self-healing, we believe that increased intelligence in security deployments is inevitable moving forward. To be sure, human intervention will still be required for many security issues; after all, in most cases it is human intelligence behind the attacks. But just as the self-healing, self-provisioning, and self-management initiative continues to promise reduced workload for IT staff, so would increased intelligence in security products aid and abet the IT security officer who is bombarded with a constant stream of new attacks designed to defeat his or her most recently deployed security product.