

# It's a virtual world – or is it?

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## Quocirca Comment

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As the massed hoards descend on Copenhagen for VMworld Europe, you could be forgiven for thinking that virtualisation of everything is a done deal, and that the arguments are now all about what can be done with an IT platform that has already been virtualised. Vendors are now offering management suites focusing on the virtualised estate, virtual desktop provisioning tools, advanced licence management systems and backup and restore offerings for dealing with the sprawl of virtualised data, it would seem that the argument as to which hypervisor should be used as a platform for virtualisation has gone away.

However, Quocirca carried out research at the beginning of the year which asked 900 respondents from large and very large organisations around the world what the level of virtualisation in their IT environment was (see graph).

As can be seen, over 60% of respondents still have less than half of their servers virtualised, and 23% have less than 10% virtualised. Sure, the majority of organisations will be evaluating virtualisation, and it is a pretty good bet that the adoption is speeding up and that it makes sense at many technical and business levels, including upping overall hardware utilisation rates, lowering energy usage and enabling more cost effective licence management through rationalisation and consolidation.

What the goings-on at VMworld do show is that there is a maturing of the vendors. When the latest virtualisation technology first came to market in the early 2000s, the initial euphoria was countered by the reality of how such an environment could be layered on top of a physical system, and how both physical and virtual systems need to be managed effectively in tandem. VMware itself has since moved to create a far more advanced suite of management tools around its ESX and ESXi hypervisors, and is providing greater focus on what can be done with a virtualised platform. The focus has now moved on from managing the

virtual and physical environments separately (the physical world being left to the incumbent systems management vendors such as IBM, CA, BMC and HP), to both camps now realising that issues such as root cause analysis require a full view of both the physical and virtual, and their systems now being able to manage the total environment with one toolset.

Third party vendors of tools to “help” in the virtualised space seem to be split into two camps – those who are somewhat carried away around the thought of virtualisation in its own right, and those who are trying to ensure that an organisation can get distinct business value from it. The former’s star may burn brightly for a while, but their lack of provision of any real business value will doom them to failure. The list includes those who are focusing purely on the virtual to the exclusion of the physical; those who are trying to sell on-premise virtual capabilities that are better served externally from the public cloud; and those who are selling point solutions where the bigger vendors are likely to railroad them through developing their own solutions to be integrated into existing systems within the next year or so.

The latter includes the more intelligent vendors, they are changing rapidly and showing maturity in their offerings. Whereas the talk in the past for end-user access has been around fully-virtualised desktops hosted on a virtualised server farm, the majority of vendors in the market (such as Centrix Software and RES Software) are both looking at how a hybrid environment, using the capabilities of the client device where it makes sense while using virtualisation and “sandboxing” (the protection of one environment on the device from the device itself) on the device to enhance security, can offer more to an organisation than a pure dependence on a server-based solution.

Others are looking at how to manage virtual application and functional images. Again, in the past, many organisations have been caught up in “image sprawl”, where images are created, used

and then left still semi-active, and only see any real problems when an audit shows thousands of licences are nominally in use in images that haven't been touched for months. The need for images to be provisioned on an as-needs basis, and then deprovisioned after use, with licences being freed up and put back into the pool is something that is now being focused on, not least by VMware itself (and by Microsoft for its own Hyper-V platform), as well as by some of the licence management companies such as Flexera.

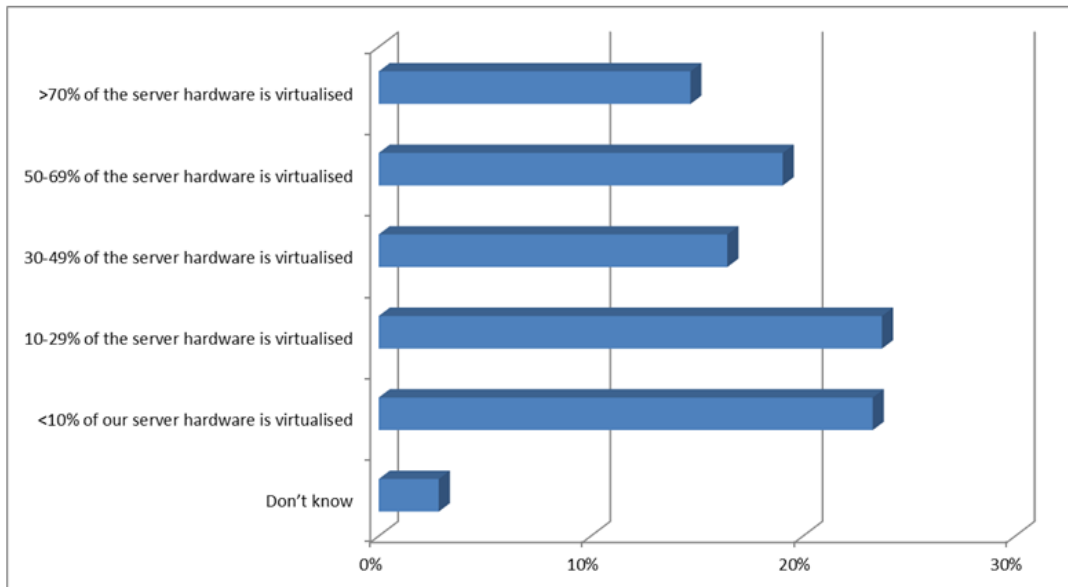
However, some of these images will need to be protected, and companies such as Acronis are providing tools that can back up and manage images in an effective manner such that they can be either stored in a state enabling rapid recovery from any fault, or can be stored off-line in a manner where licences can be deemed to be not in use. The management of images in this way should not, however, be confused with backup and restore in a virtual environment. Dealing with full environments that include dynamic files and data needs a different

approach, but it is good to see that again the main players in the market are seeing this need and are providing tools that can span across the different image and storage environments.

VMworld Europe is well attended, but this cannot be taken as a direct reflection of true activity in the market. Attendees are from the techie community – not the business. These techies are the vanguard, not the mainstream, and although virtualisation will be the de facto path for the vast majority of organisations, it is also a journey that the majority are still just beginning.

For those who have only dipped a toe into virtualisation, VMworld Europe should be viewed as good news – the early problems with the views that virtual and physical environments could be managed with through different toolsets are rapidly being done away with, and more functional tools are now available that deal with the total environment, whether it be physical, virtual or hybrid.

## How much virtualisation is there in your run time environment?



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## About Quocirca

Quocirca is a primary research and analysis company specialising in the business impact of information technology and communications (ITC). With world-wide, native language reach, Quocirca provides in-depth insights into the views of buyers and influencers in large, mid-sized and small organisations. Its analyst team is made up of real-world practitioners with first-hand experience of ITC delivery who continuously research and track the industry and its real usage in the markets.

Through researching perceptions, Quocirca uncovers the real hurdles to technology adoption – the personal and political aspects of an organisation's environment and the pressures of the need for demonstrable business value in any implementation. This capability to uncover and report back on the end-user perceptions in the market enables Quocirca to advise on the realities of technology adoption, not the promises.

Quocirca research is always pragmatic, business orientated and conducted in the context of the bigger picture. ITC has the ability to transform businesses and the processes that drive them, but often fails to do so. Quocirca's mission is to help organisations improve their success rate in process enablement through better levels of understanding and the adoption of the correct technologies at the correct time.

Quocirca has a pro-active primary research programme, regularly surveying users, purchasers and resellers of ITC products and services on emerging, evolving and maturing technologies. Over time, Quocirca has built a picture of long term investment trends, providing invaluable information for the whole of the ITC community.

Quocirca works with global and local providers of ITC products and services to help them deliver on the promise that ITC holds for business. Quocirca's clients include Oracle, Microsoft, IBM, O2, T-Mobile, HP, Xerox, EMC, Symantec and Cisco, along with other large and medium sized vendors, service providers and more specialist firms.

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