



MARKET NOTE

Actifio's Validation on the Nutanix Platform Plugs the Data Management Services Gap for Modern Enterprise Infrastructure

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EXECUTIVE SNAPSHOT

FIGURE 1

Executive Snapshot: Actifio's Validation on the Nutanix Platform Plugs the Data Management Services Gap for Modern Enterprise Infrastructure

Data virtualization and data-as-a-service provider Actifio has its Actifio Sky software validated on the Nutanix Enterprise Cloud Platform. Together, Nutanix and Actifio aim to deliver a web-scale, simplified hyperconverged infrastructure (HCI) for modern applications, as well as vital data management services needed for modern enterprise infrastructures characterized by hybrid and multicloud infrastructures and a growing range of legacy and modern applications portfolio.

Key Takeaways

- As one of the pioneers in the HCI market, Nutanix has been innovating with software-defined, web-scale infrastructures and easy-to-use systems. As it elevates its platform play and positions its enterprise cloud platform as a strategic infrastructure in a modern datacenter, Actifio's software and data services can help it deliver end-to-end data management capabilities.
- With "Nutanix Ready" certification, Actifio's enterprise data-as-a-service software can run on top of the Nutanix platform, providing full data services for enterprise workloads as an integral service within HCI.
- Actifio data services on the Nutanix platform include application-aware data capture, data management services — ranging from data protection and disaster recovery to test data management — and analytics for all enterprise workloads.
- Actifio's RESTful API, which enables full integration with continuous integration/continuous deployment (CI/CD) pipelines bolsters Nutanix's DevOps capabilities.
- Although the synergy between Actifio and Nutanix is complementary and both vendors have similar momentum in innovation and vision of hybrid cloud, they need to enable partners and highlight the benefits of the joint solution around regulatory compliance, DevOps and application, and data portability as competition intensifies in the hyperconverged and data management space.

Source: IDC, 2017

IN THIS MARKET NOTE

This Market Note assesses the recent announcement of data virtualization and data-as-a-service provider Actifio regarding its validation on the Nutanix Enterprise Cloud Platform. It evaluates how, by gaining the "Nutanix Ready" certification, Actifio and Nutanix can provide the vital data management services needed for modern enterprise infrastructure characterized by hybrid and multicloud infrastructures and a growing range of legacy and modern applications portfolio.

IDC'S POINT OF VIEW

Nutanix is one of the pioneers and market leaders in the European hyperconverged infrastructure market. The company differentiates itself from the rest of the hyperconverged systems vendors by positioning itself as an enterprise cloud company, offering software-driven, web-scale infrastructure solutions for on-premise datacenters that are flexible and scalable in the same way as external cloud resources, while maintaining location and compliance control fully within the IT department.

The Nutanix Enterprise Cloud Platform combines web-scale infrastructure with consumer-grade usability. It natively converges compute, virtualization, and storage into a software-defined solution to eliminate datacenter complexity and silo, deliver predictable performance for multiple workloads, provide linear scalability and nondisruptive upgrades, and offer cloud-like infrastructure consumption experience.

Nutanix offers its software solutions primarily in the form of x86-based appliances, and its core portfolio consists of two software solutions — Acropolis, the software "fabric" that delivers infrastructure services on top of standard x86 architectures in a hyperconverged fashion; and Prism, the management software for orchestration, monitoring, and operation of virtual resources. Although such a simple-to-use, web-scale infrastructure platform that delivers agility and performance for a broad range of workloads is essential, the key missing gap in the Nutanix platform was around the data management capabilities to provide end-to-end infrastructure and data services for enterprise IT from one console.

Nutanix has a fully featured enterprise storage solution that supports inline data reduction, snapshots, clones, encryption, replication, disaster recovery, and a full suite of telemetrics for management purposes, but its key focus and engineering strengths are more on the compute side and its vision for a "one-click" hybrid cloud strategy. Part of it also has to do with European companies' perception of hyperconverged systems. IDC's 2017 *European Datacenter End-User Survey* involving almost 650 users revealed that speed and ease of deployment is cited as the biggest benefit of hyperconvergence over data management, backup, and recovery features.

The validation of Actifio's software helps Nutanix instantly plug this gap and makes its enterprise cloud platform a viable infrastructure for workloads beyond virtual desktop infrastructure (VDI). IDC believes that delivering infrastructure simplicity and cloud-like consumption models, as well as enterprise-class data services for key applications via one consolidated platform, eliminates complexities without compromising data management. It is also becoming important for enterprises to have application-aware data services such as those provided by Actifio as business applications become more complex and dynamic.

As part of the certification, Actifio's Sky software will run directly on the Nutanix Enterprise Cloud Platform and deliver a wide range of data management services, such as data protection and disaster recovery, to test data management and analytics, for enterprise workloads running on Nutanix.

Actifio virtualizes enterprise data, abstracts and frees it from infrastructure, making it easier to access and simpler to protect. This is because virtualizing data eliminates the need to create multiple copies of the same data for different use cases such as test and development, analytics, backup, or disaster recovery. This multiplicity of the same data — called copy data problem — costs organizations more storage, data protection, and data management resources. IDC sees that data virtualization is gradually becoming an accepted best practice among European enterprise customers looking to establish a hybrid cloud architecture. The ease of moving virtual data across infrastructures, the smooth virtual data access, and the simplicity in protecting enterprise data delivered by data virtualization prove appealing to companies seeking to eliminate data management complexities and have a simpler strategy to comply with toughening data compliance regulations. Actifio's patented technology called Virtual Data Pipeline allows businesses to deliver enterprise data-as-a-service.

The combination of Nutanix and Actifio can offer end-to-end solutions for cloud data management including infrastructure, data, and applications.

In conversations with IDC, European enterprises said they seek agile, scalable, and future-ready infrastructure, but at the same time, they cannot compromise on the data management layer and need instant access to application data as well as keep data secure and compliant. IDC believes the combination of the Nutanix platform and Actifio data services enables application and data portability in a heterogeneous multicloud, hybrid IT world. While it is possible for enterprises to purchase individual point solutions on hyperconverged infrastructure to meet data management needs, the full suite of data services — backup, disaster recovery, test data management, and reporting — delivered as an integral part of the platform without incremental expense or operational complexity can make a difference to IT. IDC believes that by plugging the missing link to enterprise cloud management — data services — Nutanix's hyperconverged solution becomes a viable standalone option for critical workloads.

Key Steps Toward Expanding Nutanix's Total Addressable Market Beyond Hyperconvergence

The Nutanix platform is a software-defined platform that can run on different hardware, supporting different hypervisors, including VMware vSphere, Microsoft Hyper-V, and the company's own hypervisor Acropolis. Based on this approach, Nutanix looks to compete beyond traditional hyperconverged providers to compete with infrastructure players such as VMware and Amazon by offering a solution that enables migration between clouds, hypervisors, and containers while eliminating vendor lock-in.

Nutanix is focusing on innovations around container services, more storage features (block storage), and one-click provisioning of routine tasks such as virtual machine (VM) creation. However, enterprise-grade data management features are a key part in fully realizing this vision. The collaboration allows Nutanix cloud platform users to also benefit from up-to-date protection and recovery operations for all enterprise data workloads, control the sprawl of nonproduction data, as well as speed up the provisioning of data for application development — thanks to data virtualization features.

For European enterprises, the future is a hybrid, multicloud IT world. But to leverage application and data portability as well as protection in this multicloud world, IT must break out of inflexible traditional infrastructure and archaic data management models designed in the 2nd Platform era.

The Road Ahead: Challenges and Opportunities

Although the Nutanix-Actifio collaboration brings significant value to the Nutanix hyperconverged platform, the two companies need to keep the momentum of joint innovation. For one, the Actifio Sky v7.0.4 is currently validated on vSphere version. Nutanix's hypervisor compatibility extends to Microsoft Hyper-V and Nutanix's own software Acropolis. Both companies will need to work together to further integrate Actifio data services into this one-platform vision across all hypervisors to give customers a mixed virtualized estate and a seamless experience.

Second, Nutanix and the Nutanix-Ready certified Actifio solution is immediately available through channel partners in Europe. Both companies will need to enable channels with proofs of concept (POCs) and use cases to demonstrate the benefits to enterprise customers.

Nutanix is rapidly building an ecosystem around its platform that includes data management service providers such as Rubrik. Actifio will need to highlight the differentiations it brings and the business outcomes it can deliver with its "Nutanix Ready Core" status.

Lastly, Nutanix had an unstoppable run in the European market at a time when some of the largest infrastructure suppliers were less committed to a hyperconverged market. Such conditions no longer exist with heavyweight IT vendors such as HPE, Dell EMC, VMware, and NetApp rapidly innovating in the hyperconverged space. These vendors are also highly experienced in data services business and can offer similar services. But Actifio — with its patented technology and innovation in the data-as-a-service space — has an early-mover advantage, and the two companies need to highlight this.

Emphasizing the Multicloud and DevOps Play

IDC sees Nutanix's commitment to containers as its gateway to enabling DevOps processes at its customer sites. Allowing containers to run on the Nutanix hyperconverged platform, the company aims to bring DevOps-style management to its virtual infrastructure. IDC sees DevOps capabilities in Actifio's solutions as further strengthening Nutanix's DevOps play.

The RESTful API in Actifio allows for easy integration with DevOps toolchains or CI/CD pipelines. Automation tools, such as Chef, Puppet, Ansible, or Jenkins, can provision virtual databases on-demand, wherever and whenever needed. DevOps teams constantly require access to test data. Actifio Sky software creates virtual copies of databases for the dev/test host resources, on-schedule or on-demand, so that appropriate users have access to the correct and most up-to-date data. According to Actifio, to make DevOps easy to manage, these virtual copies are read/writable and can be reprotected easily for bookmarking and rollbacks, so destructive testing can be done with minimal lost time for recovering a prior environment.

Future Outlook for Actifio-Nutanix Solution

Nutanix and Actifio must also educate the channels and end users about other outcomes such as DevOps enablement. This is likely to make enterprises more committed to other IT vendors for their multicloud or hybrid cloud strategies to evaluate the Nutanix-Actifio technology. Also, critical to Europe is the upcoming General Data Protection Regulation (GDPR). Demonstrating how Actifio can help enterprises remain compliant and have automated long-term data retention policies can open more doors for customers.

The hyperconverged market in EMEA, including hardware and necessary system infrastructure software, will grow to reach \$700 million in 2017 (+45% YoY), and it is poised to double to more than \$1.4 billion per year in 2020. As Nutanix targets a wider addressable market beyond hyperconvergence, it will need to demonstrate how its solutions sit in the context of the 3rd Platform trends of mobility, virtualization, adaptable security, cloud services, open source, and immediacy of provisioning. In its second phase, it enters a market that is a stronghold for many established players, such as HPE, Dell Technologies, IBM, and cloud players.

The certification of Actifio is proof that Nutanix is serious about adding more enterprise features and eager to plug all the gaps required to deliver a complete cloud-focused platform to enterprises.

In today's enterprises, different application tiers have different recovery time objective (RTO), recovery point objective (RPO), and retention requirements, and enterprises often use multiple point tools to meet their needs. This increases operational complexity and total cost of ownership (TCO) and results in siloed data management, making compliance difficult to manage. Actifio provides a single data management architecture to support multiple RTO, RPO, and retention policy combinations, improving internal service-level agreements (SLAs) while reducing cost, complexity, and business risk — across whatever cloud-based or on-premise infrastructure that sits behind it. We see this as elevating Nutanix Enterprise Cloud Platform's positioning.

IDC also believes there are many synergies between Actifio and Nutanix. Both start-ups have established themselves by identifying entirely new market segments (copy data management and hyperconverged infrastructures, respectively) to address enterprise IT pain points. Both are perceived as vendors that can innovate quickly and continuously and both share a strong vision for their technology's place in the future hybrid multicloud world. Both providers have a global reach and target similar types of large as well as midmarket enterprises.

Nutanix makes infrastructure invisible, freeing up IT to focus on the applications and services that power their business. Now, the addition of Actifio's software will further simplify and automate data management in the enterprise.

IDC believes the Nutanix Enterprise Cloud Platform provides software-defined, cloud-like scalability, and agility as the underlying infrastructure. The Actifio data management software on the Nutanix platform, meanwhile, is similarly virtualized, enabling instant access to application data, regardless of data size. The combination brings improved application and data portability across the underlying infrastructure whether it is on-premise datacenter or public cloud. The consolidation of infrastructure and data services onto a single platform further eliminates complexities, making the joint technology more attractive to enterprises.

In a modern enterprise, business data and the applications that power the business along with data protection are at the core of IT strategy. They dictate the infrastructure choices that enterprises make. Amid this, new types of synergies, such as the one between Nutanix and Actifio, are likely to become winning strategies for vendors to expand their opportunities.

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- *IDC Survey Spotlight: What are the Key Datacenter Investment Priorities for European Organizations in 2017?* (IDC #EMEA42767917, June 2017)
- *New Relic Beefs Up its Digital Intelligence Platform to Provide a Single View of Applications and Infrastructure Performance* (IDC #EMEA42751617, June 2017)
- *IDC Innovators: European Software-Defined Storage Solutions for Service Providers, 2017* (IDC #EMEA42537617, May 2017)

Synopsis

This IDC study assesses the implications of Actifio software's validation on the Nutanix Enterprise Cloud Platform. Data virtualization and data-as-a-service provider Actifio and hyperconverged vendor Nutanix aim to provide key data management services as an integral service from within the Nutanix platform to serve diverse applications in the hybrid and multicloud IT world.

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