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The Future of the Data Centre

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Current Data Centre Trends

- Massive Consolidation
 - Pressures on operational expense
 - Carbon Tax – Energy Efficiency
- End of life facilities
 - Power demand per square foot versus 5 years ago
- Virtualisation - The Killer App?
 - Utilisation, Fluidity, Resilience.
- Rethinking Disaster Recovery
- Continue to present to business a very technical, not services, orientation
- Everything is difficult...



Shifts in the ecosystem

- Historically, very horizontal in nature
 - NW, Fabric, Storage, Server, DB, Apps, Services
- Today - becoming much more vertical
 - Dell/Equallogic, Oracle/SUN, EMC/VMware, Cisco/Servers, HP/EDS
- Current Cloud providers
 - Amazon, Safesforce.com, Iron Mountain, C&W
- Suppliers now need to be multifaceted in services they provide

Not More Cloud Definitions!

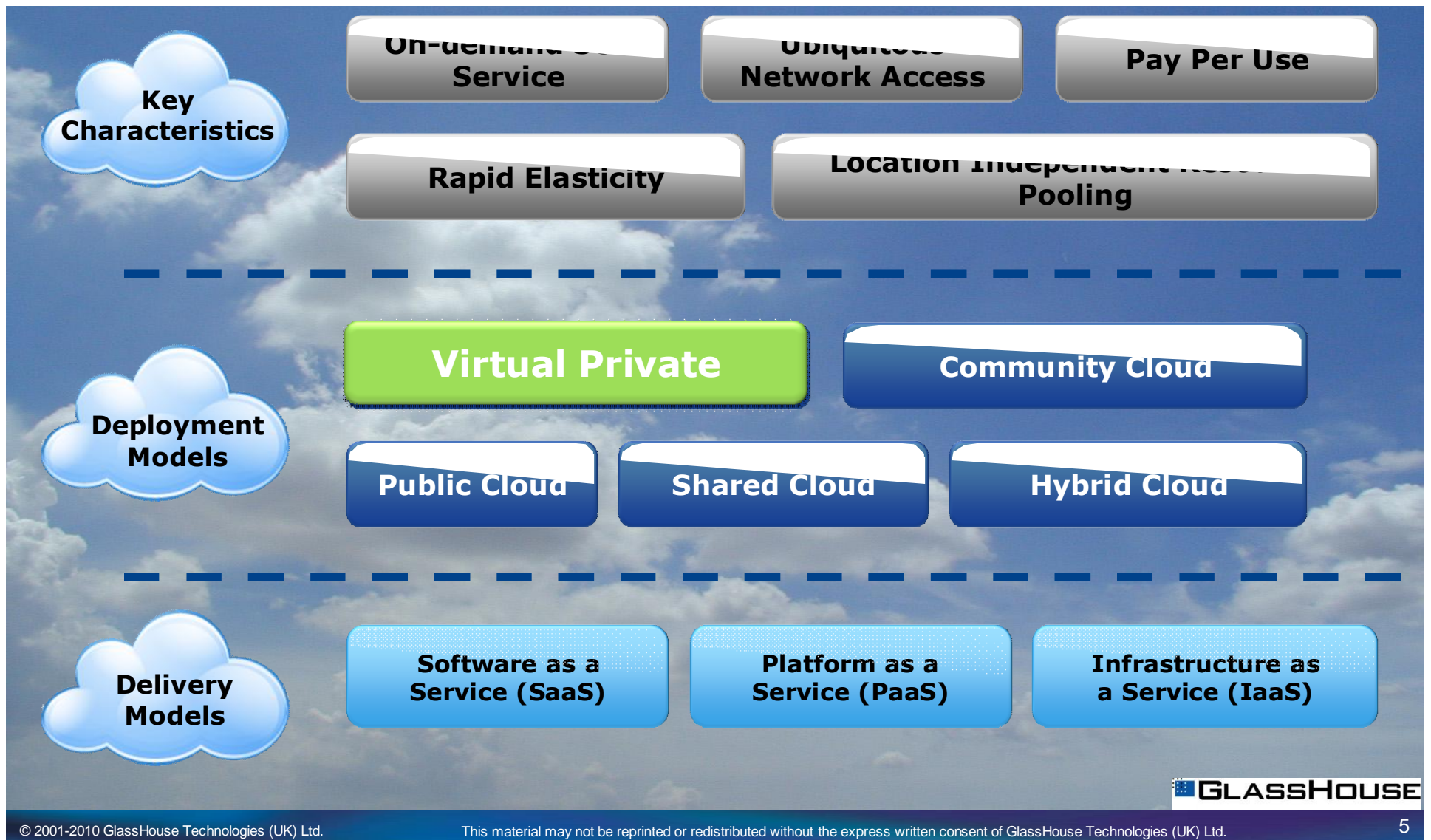
Cloud computing is a **pay-per-use** model for enabling **available**, convenient, on-demand network access to a shared pool of configurable computing resources (e.g., networks, servers, storage, applications, services) that can be rapidly provisioned and released with minimal management effort or service provider interaction

...ing Web
... software
and install.





Cloud Concepts Overview





Cloud Benefits

- Customer
 - Reduced Capex (no more hardware refresh)
 - Pay for what you use
 - Rapidly scale up and release
 - Reduced Opex (less hardware to manage and support)
 - Drives responsible use of assets and accountability for decisions back up to the Business
- Cloud Provider
 - Deploy services faster
 - Flexibility (client can rapidly scale up)
 - Sweat assets
 - Push back deployment to client?
 - Reduced management through automation



Current Cloud Trends

- Massive capital investments being made
- Vendors scurrying to port existing tools or develop new ones
- Price is compelling
- Offerings are simple – roadmaps are elegant
- Adoption is at the “low end”
 - SMB
 - Developers
 - “old” data
- CFO will be a HUGE target



Where is the Hard Deck?

- SMB will adopt in entirety, and early
- SaaS will continue to grow and move major apps in the cloud
- As IaaS Cloud Bursting becomes a reality, companies will move away from a just-in-case mentality and towards a just-enough mentality
- Very few businesses drive competitive advantage through IT infrastructure - what are the characteristics of companies that will continue to operate their own data centres?
- Adoption should be very deep if performance lives up to hype cycle



Crossroads

- Buy Side
 - Invest in DC project – run the risk of being obsolete within a couple of years
 - Hold off on DC investment – get caught behind the 8-ball if Cloud is marketing hype
 - Figure out some balance between both?
 - CIO will be under huge pressure to have a Cloud Strategy – soon...
 - Will move from buying from EOMs or their channels to Cloud providers, or brokers – vendor relationships will go through significant changes
 - Maintaining the right balance in IT Staffing



Crossroads

- Sell Side
 - Potential massive shift in number (and sizes) of customers
 - Historic channel distribution (VARs) become irrelevant?
 - Emergence of new models – e.g. cloud brokers, affinity groups
 - Services will be key
 - Cloud strategy
 - Cost Modeling
 - Migration services
 - Security/Audit reviews

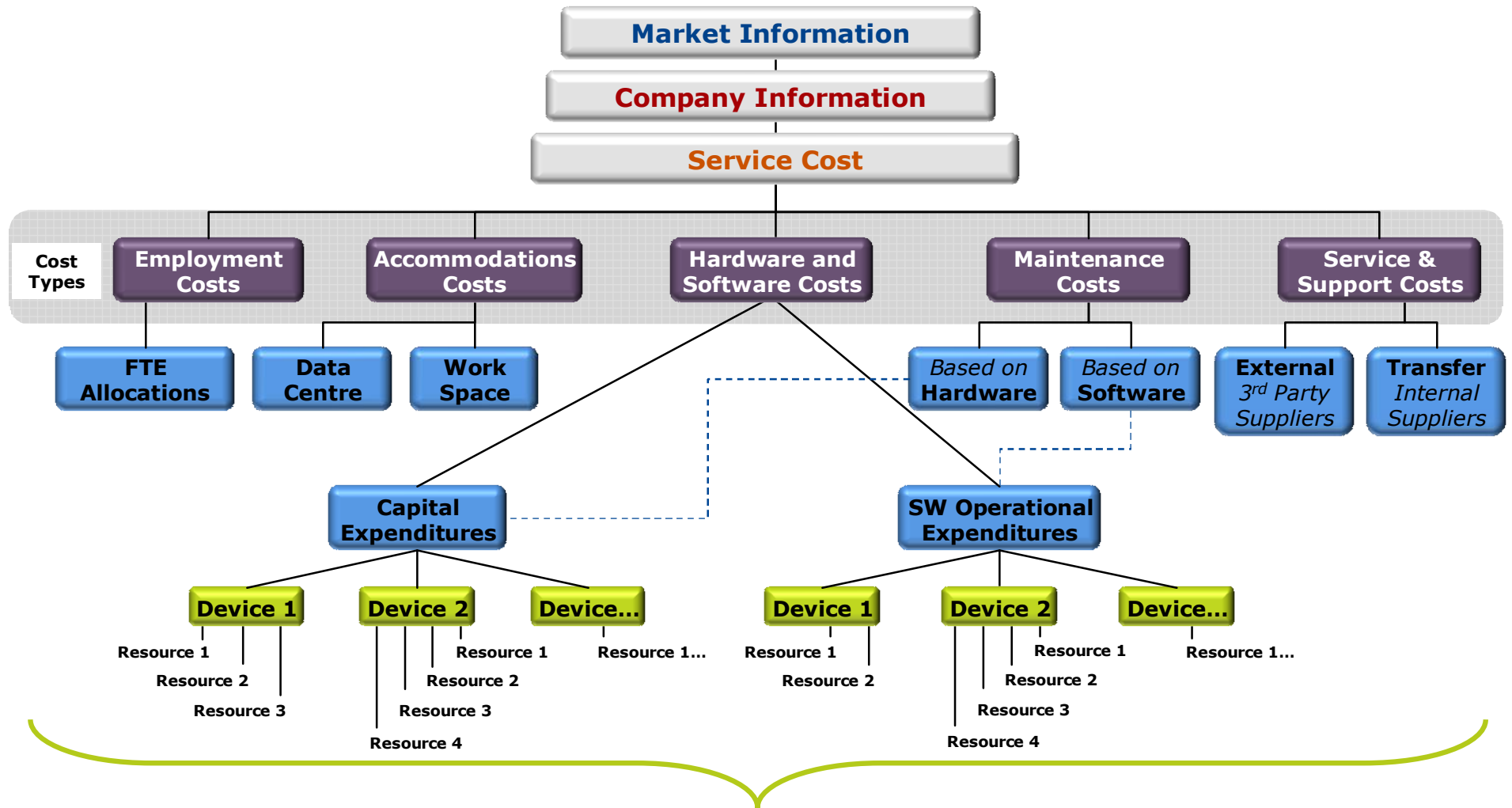


Sticking Points

- Moving currently deployed major apps to PaaS
 - IT can't account for how these are deployed in existing infrastructure. Major risk in migration, even to other fixed assets
- Regulatory compliance – where is the data?
- Security – sensitivity of data
- Channel inertia – OEM's will have to tread lightly
- Demand forecasting on the buy side – can't do it today – how will this get better?



Cost and Capacity Analysis Model



Unit Cost = The Sum of Costs / the Quantity of Units



Services Needs

- Cost baseline
 - Service definition and cost
- Which cloud?
 - Comparison of services and costs
- Get me there
- Bring me back
- Move me to a different cloud
 - Migration services
- What's the impact?
 - App deployment, App availability, DR
 - Organisation and People



Go to www.glasshouse.com/cloudreadiness
for your complimentary Cloud Readiness Assessment

Any Questions??

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