HPE unifies public and hybrid cloud strategies with GreenLake Central

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Introduction

Products and services are converging at Hewlett Packard Enterprise as the HPE GreenLake brand expands to represent CEO Antonio Neri's pledge to deliver 'everything as a service' by 2022. Management of public cloud resources from Azure is presently available, with support for AWS and Google Cloud Platform (GCP) forthcoming as HPE's OneSphere cloud platform management (CMP) is subsumed into HPE GreenLake Central.

451 TAKE

Hewlett Packard Enterprise is continuing to iterate on its HPE GreenLake everything-as-a-service portfolio by integrating functionality from the OneSphere cloud management platform, to provide a single control interface for public cloud resources alongside services offered directly through the company. HPE GreenLake Central represents a comprehensive product portfolio for which the company prioritizes the tightness of integration between first-party and third-party solutions to ease hybrid cloud deployments on both a technical and financial basis. Moreover, this announcement underpins the 'GreenLake-ification' of HPE itself as the services brand grows to represent the company as a whole.

Details

In 2017, Hewlett Packard Enterprise announced HPE GreenLake, a consumption-based billing model for backup, big data, edge compute, open source database, SAP HANA and Flex Capacity infrastructure – the latter being a redevelopment of HPE's Flexible Capacity purchasing service. HPE extended GreenLake in 2018 to include public cloud compute resources from AWS and Azure as part of an embrace of hybrid cloud deployments, with support for GCP shortly thereafter. In 2019 HPE pledged to deliver 'everything as a service' by 2022, including networking services underpinned by Aruba equipment, among others.

HPE GreenLake Central continues this pattern of providing IT as a service as HPE expands the HPE GreenLake platform to include a single control plane for managing public cloud resources on AWS, Azure and GCP alongside physical equipment and services procured through HPE GreenLake. This strategy is familiar – the newly introduced functionality in HPE GreenLake Central is a superset of features found in HPE OneSphere, a cloud management service introduced in 2017. HPE GreenLake Central also benefits from functionality developed by Cloud Cruiser, acquired by HPE in January 2017.

Notably, HPE is retiring the OneSphere branding in concert with the deployment of GreenLake Central. Given the overcrowded state of the CMP market – and integration opportunities with HPE's product and service portfolio – the core logic originally developed for OneSphere is more likely to see success as a component of HPE GreenLake than a stand-alone offering. In 2018 451 Research indicated a need for HPE to leverage its portfolio of acquired and homegrown cloud assets for OneSphere to succeed; GreenLake Central serves as a realization of that strategy.

The single control plane introduced in HPE GreenLake Central – essentially a CMP component that supports GreenLake-provisioned on-premises hardware – provides a self-service option for on-premises hardware resources provided under GreenLake. This is in addition to the traditional Flexible Capacity planning process, in which customers would meet quarterly with HPE to review the budgeted versus actual usage of on-premises hardware and adjust on-premises deployments as needed. While these meetings could also be prompted by analytics-based events or reactive trigger points (e.g., utilization exceeding a predetermined percentage of the deployed capacity), this self-service option provides the same cloud buying experience as found on public cloud platforms.

Read another way, HPE GreenLake Central is intended to provide the same fit and tidy experience to private and hybrid cloud deployments as public cloud subscribers enjoy.

HPE indicates that GreenLake Central is presently available in private beta to enterprise customers, with new customers onboarded directly into the GreenLake Central beta. Existing customers of HPE GreenLake will be transitioned to GreenLake Central when the product reaches availability in spring – specifically, prior to the start of the second half of the fiscal year.

Competition

Principal competition for HPE GreenLake Central as a gestalt product is slightly difficult to pin down. While Dell and Lenovo offer significant feature overlap in 'an on-premises looking into the cloud' point of view, AWS and Azure offer overlap in the opposite direction, and Google Anthos exists in parallel as the 'blue ocean' alternative, the assemblage of products and services from any one vendor may not reach 100% feature parity with GreenLake Central, nor will integration of those necessarily be straightforward.

This is the intended result – practically every HPE product or service is to be subsumed into GreenLake Central branding, with some (as in the case of OneSphere) ceasing to exist as a stand-alone service. That said, a distinction of reaching 100% feature parity with HPE GreenLake Central is not precisely necessary for competitors, since few (if any) enterprises will fully utilize every feature on offer.

That said, from an operations standpoint, primary competition for HPE GreenLake Central comes from AWS Outposts – Amazon's fully managed infrastructure stack, which became generally available at re:Invent 2019 – as well as Microsoft's Azure Stack Hub, a software management layer shipped with certified hardware from Dell EMC, Lenovo, Cisco and (slightly ironically) HPE, among others. For customers with existing Oracle deployments, Oracle Cloud at Customer can be used for running the full stack of Oracle services on Oracle hardware at customer premises. From a finance standpoint, primary competitors include Dell's Flex on Demand service and Lenovo TruScale Infrastructure Services.

For CMP offerings, competitors include Huawei CMP (FusionBridge), Micro Focus Hybrid Cloud Manager, Broadcom (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, CloudReach, Oracle Management Cloud, IBM Cloud Management, Microsoft Operations Management Suite, Red Hat CloudForms, VMware vRealize, AWS Cloud Management Tools, Google Stackdriver, Alibaba Cloud Monitoring & 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 Tata Consultancy Services Enterprise Cloud.

Independent multicloud and hybrid cloud management vendors include Flexera RightScale, Apptio FittedCloud, Scalr, Vapor.io, Rackn, CloudBolt, HyperGrid, CloudCheckr, Cloudability, CloudGenera, DivvyCloud, Cloudify, Embotics, Turbonomic/ParkMyCloud, Trianz, Abiquo, Platform9, Quali, InContinuum, HyperGrid, Snow Software/Embotics, Densify, Morpheus Data and Appcara.

SWOT Analysis

STRENGTHS

HPE's catalog of first-party services combined seamlessly with cloud resources is sufficiently feature-rich as to be serviceable for any organization that adopts it. As a financial model, and through the use of channel partners, GreenLake is within reach for midsize organizations.

WEAKNESSES

As with any CMP, abstracting underlying public cloud resources can result in the loss of some configuration options not exposed in a third-party CMP. Likewise, the exponentially increasing complexity of differentiated service offerings from public cloud providers puts a heavy burden on updating the CMP logic.

OPPORTUNITIES

Private/hybrid cloud deployments will continue to exist in parallel to public cloud. Managing and optimizing this spread of heterogenous resources is an ongoing task for enterprises.

THREATS

On-premises outreach from public cloud providers (AWS Outposts, Azure Stack Hub) could supplant a substantial amount of the software feature set and hardware options provided by HPE GreenLake and competitors.