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fluidOps emerges as full-fledged IaaS-enablement play

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Fluid Operations has a lot to celebrate beyond securing its latest round of funding. The company's eCloudManager is now the software component of **SAP's** Virtual Landscape Management offering. It is also used extensively throughout SAP. **EMC** makes eCloudManager SAP Cloud Platform available through its EMC Select program, and a joint venture between fluidOps and **NetApp** has seen the software integrated with NetApp storage systems as well. But the big news for fluidOps is that eCloudManager has outgrown the SAP niche in which it was born, and it now claims to enable an agile cloud for local or external users, complete with automated application and IT infrastructure.

The 451 take

In the past, fluidOps has been regarded as a SAP ecosystem play, and the 451 Group has been as guilty of this as anyone. With the new positioning, it's easier to see that the core eCloudManager layer – the semantic database and workflow orchestration – sits above the storage, hypervisor, application, network, compute and cloud resources and provides a unified interface for infrastructure and SAP management, a self-service portal and an intelligence tool. That elevates fluidOps from an application-aware infrastructure manager (although it's certainly that) to a true cloud-enablement player.

At eCloudManager's heart is an in-memory database and workflow orchestration. The database stores semantic technologies that fluidOps claims can address big problems plaguing enterprises – problems like knowledge management, unification of large heterogeneous data sources and visualization of highly complex data sets.

The semantic database and the workflow orchestration are made available through a unified API to four modules. The first is the SAP Edition on which fluidOps built its reputation. Next come an Infrastructure Edition for managing CPU, storage and application virtualization via a single pane of glass, and a Self-Service Edition that gives all internal application clients a portal for obtaining internal and external resources, metering and billing information.

Finally, the company has launched in beta an Intelligence Edition. It's designed to provide documentation, annotation, navigation and visual exploration of IT infrastructure via analytics, reporting and historical data management. A new feature in the 3.6 release of eCloudManager is called Blades as a Service. Via integration with **Cisco's** UCS blades, fluidOps allows resource monitoring, provisioning of application-aware virtual landscapes directly onto physical blades, and instant virtual-to-physical and physical-to-virtual migration.

The full release of eCloudManager Intelligence Edition is slated for the 4.0 release, at the end of March.

Hewlett Packard veterans Vasu Chandrasekhara, Andreas Eberhart, Stefan Kraus and Ulrich Walther founded fluidOps in the first quarter of 2008. The company is headquartered in Walldorf, Germany. Its flagship technology, eCloud Management Suite, was introduced in February 2009. In June 2010, Germany's Ministry of Research chose fluidOps to supply a standard interface and self-service cloud portal to the German D-Grid e-science backbone initiative.

In January 2011, fluidOps secured €5 million ($6.8 million) in its second round of financing, bringing the company's capital to €6 million. The money is earmarked for hiring new staff and further developing the company's software. As part of the fund-raising process, fluidOps changed its corporate structure from a GmbH to an AG (roughly equivalent to the change from a limited liability company to a corporation).

Competition

While fluidOps has clearly graduated from the SAP niche, it's done so only to enter a vibrant and crowded market. Our master list of cloud-enabling technology vendors is growing all the time. To the combined hardware and software plays – **VCE Co**, the **VMware**/Cisco Systems/EMC joint venture and **IBM/Juniper Networks** – we add the A to Z of software plays, from **Abiquo** to **Zimory**.

BMC, **CA Technologies**, **HP** and Big Blue are building out their enterprise systems management stacks to address virtualized, hosted and elastic cloud environments – but as we discovered in our December 2010 ICE report, 'The Big Four and the Cloud,' these stacks often simply repurpose existing technology. (The exceptions might be BMC's **Phurnace Software** and CA's **3tera** AppLogic, both conceived with cloud-like ends in mind.) The same charge might be leveled at **Platform Computing**, coming to the cloud from the grid world, and VMware itself, with its server virtualization trust fund to maintain.

Startups and smaller companies like Abiquo, **AccelOps**, **Cloud.com**, **Enomaly**, **Flexiant**, **Joyent**, **Nimbula**, **Nolio**, **OnApp**, **Virtustream** and Zimory may have an advantage in having been purpose-built for these Web-scale environments. Abiquo, for example, supports six hypervisors today and plans support for eight by the end of 2011. Nolio, in particular, shares fluidOps' appeal to the devops movement, and Virtustream rivals it in SAP specialization. Some smaller companies – notably **Eucalyptus**, **NewScale** and **rPath** – have joined forces to flesh out their offerings. In other cases – i.e., OpenStack – the service providers themselves have taken the initiative in building open source stacks to rival what **Amazon** has built internally.