Storage Vendors for All Sizes

Storage management solutions for all

By Tony Lock, March 2008

In a nutshell:

Sophisticated storage management solutions are now available for organisations of all scales, and the suppliers are seeking to deliver solutions into new markets, often outside of their traditional comfort zones.

Key points:

- Storage vendors are attempting to provide both enterprise and SMB clients with sophisticated storage platforms and management tools.
- For many suppliers this is taking them into new markets where they have previously not targeted their wares.
- Many organisations across the board should expect to be contacted by vendors with whom they may have previously enjoyed no relationship, either direct or indirect.
- There are challenges ahead for both vendors and customers. For the suppliers it is a question of how to reach new customers and position their solutions as fit for the needs of these organisations. For customers, especially those in the SMB spaces, time and resources will need to be devoted to understanding what is becoming available and to evaluate the appropriateness of newly available solutions.

I have spent a lot of time over the course of the last few months with a number of storage vendors. What has struck me most forcibly has been the continuing energy and effort being applied to the provision of new solutions and the extension of existing offerings into new markets. In the last quarter of a year I have especially noticed that many vendors are now expending considerable energy to actively seek to promote their wares in markets where they have not, traditionally, focused in the never ending effort to gain new customers, preferably profitable, customers. I am going to look at three in particular to illustrate the differing approaches being adopted by storage suppliers as they seek to grow.

Let's start by considering the company formerly known as Network Appliance. At its recent worldwide analyst meeting NetApp, as it is now officially named, highlighted some interesting research. Chief amongst which was that when one considers the major storage vendors by the volume of storage they manufacture, rather than by the volume of storage they sell under their own brand name, NetApp now believes itself to be ranked number 3 behind EMC and HDS. Even more interesting is that the company claims that it is now number 4 in the provision of storage software behind EMC, Symantec / VERITAS and IBM.

On the face of it these figures are impressive and are even more so in the light of the company's research that shows that in unaided awareness surveys NetApp was recognised by only some 9%

of organisations across the world, whilst achieving only a staggeringly low 3% recognition rate in EMEA and just 5% in Asia Pacific. I find these numbers almost unbelievable, but then again I spend a lot of time speaking with storage vendors. But in order to try and raise the company's profile NetApp is going to actively target the 90% of the 5,000 largest buyers of storage with whom it does not currently enjoy a "decent" share of the storage spend wallet. Despite the company doing a poor job of stating so, this does not mean that NetApp will not be paying attention to the large numbers of organisations in the small and mid-market sectors where it currently enjoys success but simply that it, in tandem with its partners, will be actively pursue the larger consumers of storage.

In contrast EMC, HDS and Fujitsu-Siemens along with IBM are all vigorously seeking to enhance their presence in the small and mid-market sectors. For example Fujitsu-Siemens is now looking to deliver its sophisticated X10Sure solution to SMEs. This solution allows multiple servers (both physical and virtual) to access a common pool of networked storage resources to provide better business service resilience and recovery without the need to devote significant dedicated resources to high availability provisioning. The solution, which is available as either a dedicated appliance via a software licence provides the type of remote boot and automated fail over capabilities using pooled server and storage resources. Such facilities have traditionally been the province of only highly business critical systems, and then usually only in large enterprises. This is a good example of a vendor looking to take technically advanced storage solutions into the broad midmarket sector of the economy.

Consider Brocade. As a company it is now attempting to push into markets adjacent to its traditional core storage networking base, or to create new markets close to its home. One example would be its File Management Engine appliance that enables the transparent migration of open files, including Microsoft Windows files, to assist in the maintenance of service level agreements. The software in the appliance also has the capability to discover the where, what and when accessed / edited of file use. These are facilities with which Brocade has not heretofore been associated.

All of these vendors, and indeed most of the rest of the storage community including HDS, EMC, IBM, Symantec et al, are not simply faced with developing new solutions. Beyond this for all of them lies the challenge of positioning themselves and their offerings in markets where they are not well known. This is no minor issue. Moving beyond an established base poses many questions and perception challenges and I confidently expect every storage vendor to have to meet this head on in the coming months. Who will come out ahead?

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