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## Market Roundup

September 17, 2004

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### Cisco Fattens Up on the IT Pie

*By Harry Fenik*

Cisco announced this week the acquisition of two companies: NetSolve, Inc. and Dynamicsoft. NetSolve, headquartered in Austin, TX, provides remote network and IT infrastructure management services for businesses. Cisco believes NetSolve's services will further enable Cisco and its channel partners to offer customers realtime monitoring of Cisco products and help ensure continuous, secure operation of advanced Internet Protocol (IP) services such as IP telephony and security. Dynamicsoft, of Parsippany, NJ, is a leading developer of Session Initiation Protocol (SIP)-based solutions that allow telecommunications service providers to deliver advanced IP voice, data, and multimedia services.

These acquisitions are not unique for Cisco as it has been on a spending spree for some time. However, they do give some indication of its long term and not very secret intent to extend its reach beyond the network to the horizontal applications that run through its routers and switches. Recently, both directly and through partnerships, Cisco has branched out beyond its historic data roots into the VoIP, storage, multi-media, and services arenas. Both acquisitions strengthen Cisco's hand by giving its partners new tools, supported by Cisco, to provide increased value-add services without needing to cobble them together inhouse. This should make it easier (read faster/cheaper) for partners to deliver profitable services to shore up the continuing pressure the partners are feeling from shrinking prices and margins from hardware sales while giving Cisco increased revenues and greater channel control. This in turn should strengthen Cisco's already significant control of this market segment as consolidation in all areas of the tech sector continues unabated. So far, Cisco has mostly stuck to its knitting by focusing on horizontal network environments. However, as more management for systems, storage, and applications are demanded in heterogeneous IT environments, Cisco is positioning itself to take on the role of the manager of anything that connects to a network. While Cisco partners with virtually every storage and systems vendor on the planet, these partners may find themselves ultimately relegated to shrinking piece of the IT management pie.

### HP Outlines Network Storage Strategy and Roadmap

*By Rob Kidd*

HP recently outlined the company network storage strategy and roadmap, HP StorageWorks Grid, covering what is planned through 2008. The HP StorageWorks Grid Architecture focuses on storing information across individual smart cells, as the basis of the storage ecosystem and ILM. The initial StorageWorks offerings will include Reference Information Storage System (RISS), an archive and retrieval solution for storing, indexing, and retrieving information; AutoStore middleware, which transforms paper documents to policy based digital information; Scalable File Share, a self-contained file server that enables parallel file distribution across clusters and StorageWorks arrays; and XP12000, a two-tier storage architecture and single-system image management solution. The company also announced partnerships with Cisco Systems, Brocade, and McData, among others, as

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well as training and education programs for channel partners and SMBs. RISS solutions currently are focused on archiving of email and Microsoft Office documents. Future phases include HP ILM partner program integrations and expanded support to cover additional information forms.

The three core components of StorageWorks phase I are RISS, Scalable File Share, and the XP 12000. These are aimed at addressing current customer concerns as well as having a bigger and better solution to competitive offerings. The XP12000 enterprise hardware should be a welcome offering for those who have found previous HP solutions to be less than optimum in price/performance, and could help HP's recent flagging performance in servers and storage. In another direction, it is clear that HP RISS is targeting the EMC Centera market, which is being driven by regulatory compliance management, as well as the lower price points made possible by use of Intel processors and ATA drives. Centera and RISS both aim for archive and retrieval that is data storage medium-neutral and are initially focused on managing email and office documents, the bulk of data coming under increased regulatory scrutiny. With StorageWorks phase I, HP now has a new means by which to compete in the compliance market. It is clear that HP is driving to make up the ground lost in the storage arena given its planned marketing programs that among other things include a seventy-city "Better Together Tour" (the Simply StorageWorks customer and channel partner road show), featuring the technology, and showcasing HP storage expertise with live presentations. While HP's aggressive marketing may allow the company to gain more traction with its storage solutions, as always the company's long-term prospects will depend on the timely and proficient execution and delivery on its long-term StorageWorks roadmap.

## Sun Open Sources Solaris and Builds a Bridge to the New Reality

*By Rob Kidd*

Sun Microsystems has announced an open-source project based upon Solaris 10. Under this project, Sun engineers, partners, and other programmers will be able to contribute to the development of Sun's flagship UNIX implementation. The company is presently testing the program with some customers with the view of finalizing it by year-end. Sun engineers' contributions will constitute the core operating system and with future releases, Sun will selectively add from the works submitted by other participants. Portions of Solaris 10, such as device drivers, are others' intellectual property; hence Sun plans to release source code as well as binaries, so that proprietary code would not be accessible. The company stated that by moderating the future development, it would ensure that Solaris is not fragmented into different, incompatible versions. Sun indicated that it is presently working out legal issues, establishing a mechanism to take outside contributions, and determining the project's governance model. Solaris 10 will feature new enhancements, such as a new file system, a more granular security model for access privileges, predictive self-healing, and a dynamic tracing feature. In addition, N1 grid containers, which allow isolation of multiple processes running within a single instantiation of the operating system, will be part of Solaris 10 as will the Janus technology that enables unmodified Linux applications to run on Solaris, out of the box.

Currently most Solaris applications run on UltraSPARC. Sun has renewed its promotion of Solaris on x86, especially Opteron. One of Sun's stated goals for the open source project is to build interest in Solaris and improve ties with developers, while also making it easier for customers to deploy third-party open source software on Solaris. After being Copernican for most of its history, this open source project reflects the company's recognition that IT is living in a changed reality. Linux represents a substantial threat to UNIX as witnessed by Sun's eroding developer base and this project is one of many initiatives to stem the bleeding. By making Solaris feel more like Linux's open nature, the company may be able to co-opt some of the luster surrounding the penguin's brood while demonstrating loyalty to its installed base. By taking the position of open source Solaris moderator, Sun will be able to cherry-pick Solaris enhancements for future releases, leveraging the efforts of Solaris contributors; assuming of course, that this project fosters the sense of community and camaraderie typified by the Linux faithful. Sun has typically excelled when it wrote the playbook. This open source project is another example of the company's tenacity in attempting to drive change in the marketplace. Will this flavor of open source work in the long run for Sun? Only time will tell. However, open source comes with an interesting cornucopia of (at times) conflicting expectations. It will prove interesting to watch how the company and community interact, and

ultimately whether or not this initiative will bolster Sun's position, or just become another distraction on its downward market trajectory.

## CA BrightStor Has a Bright Idea

*By Joyce Tompsett Becknell*

Computer Associates has announced availability of the latest generation of their intelligent storage management solutions, BrightStor r11.1. The offering is built around thirteen different products that have been enhanced and integrated to work with over 100 storage arrays, tape libraries, SAN switches, servers, operating systems, databases, and applications. BrightStor also has some capabilities for data protection. CA has announced their intention to help customers better align storage spending with business value.

Storage vendors have awoken to the fact that data no longer exists in a safe little universe of one application on one server with homogeneous hardware cushioning it from the mad, bad world. In fact, corporate architecture with multiple operating systems, applications, and dubious hardware vintages meant that IT managers had to perform amazing acts of data management with various products which could not talk to each other and were often very different, even if they were from the same company. It seems only recently to have occurred to storage vendors that IT managers might in fact want to manage data for their UNIX databases and Windows applications with the same management engine and user interface, regardless of the underlying server or storage. This epiphany has led to a season of product releases designed to rectify this problem and better integrate management products. Additionally, vendors have seized upon the bright idea that bundling products together in solutions is generally more useful and cost-effective to customers than forcing them to purchase multiple individual products and assembling them ad hoc.

To our way of thinking, this is an obvious good thing. Storage resource management (SRM) is the must-have product of storage because the battle of control over IT function and spending will only be won by better management, automation, and service-based approaches to infrastructure. CA's product integration, ranging from laptop to mainframe, should make life easier for managers who have already standardized with BrightStor, and should give beleaguered managers still searching for the right tools an option to storage hardware vendor solutions. While specialized storage management solutions from vendors such as EMC and Veritas still dominate an enterprise IT world that relies predominantly on storage specialists, the realities of shrinking budgets and personnel generalization may create an environment where BrightStor will find a bright spot.