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## Market Roundup

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## Sun Thumper and the Opteron Chase

By Rob Kidd

It has been reported that Sun is planning a very aggressive thrust into the market with new Opteron-based products and offerings in 2005. The internal code name for this effort is Thumper. At the heart of Thumper is the data center-in-a-box concept in which Sun ships pre-tested, pre-configured bundles of servers, storage, networking, and software. The company advocates that this is a better, less costly customer alternative than inhouse customer assembly of components into a solution. Sun has promoted this type of offering in the past, but previous offerings were based on UltraSPARC and other Sun proprietary technology. By bringing the concept to the Opteron market Sun reportedly plans to capitalize on sales of its current two- and four-way Opteron processor-based servers. Thumper will feature price/performance-optimized Opteron processor-based systems, packaged with Sun networking and file system technology. The 64-bit release of open Solaris 10 will be integral to the Thumper effort. Sun plans to pre-configure the offerings to work with a wide range of third party networking gear, storage boxes, and software.

We believe Thumper further reinforces Sun's growing commitment to the x86 market and could benefit Sun, Sun's installed base and new customer acquisition, and present a major threat to competitors such as HP. However, Thumper will have to deliver on IT cost containment, industry-leading price/performance, and the promised packaging; otherwise, this is all just ho-hum rhetoric and conjecture. In short, Sun's exploitation of the power of Opteron should provide an edge in sales to those who seek cost containment and consolidation as well as SMBs who would likely find data center-in-a-box packaging attractive. In conjunction with the Solaris 10 open source initiative, Thumper would offer Sun developers and partners additional reasons to remain loyal to Sun and could further stimulate Sun's hardware sales. A performance-optimized Thumper system could well rise to lead the pack of Opteron-based server systems from a networking, processing power and software viewpoint as Sun is one of the very few who have made a far-reaching public commitment to the platform. AMD probably could not be happier to hear about Thumper. If successful, it would certainly drive adoption of Opteron. From our vantage point, Sun continues to position itself to win the Opteron chase; however, this race has just begun with the marketplace jury still out deliberating its ultimate verdict on Opteron and Sun's role therein.

## WebSphere into the Stratosphere

By Rob Kidd

IBM has announced enhancements to WebSphere Applications Server, WebSphere Applications Server on zAAP (Applications Assist Processor), WebSphere extended development, developer software, business integration modeler, WebSphere Portal, WebSphere everywhere access and connection, and WebSphere voice server. WebSphere Application Server and zAAP provide the high-availability services, simultaneous detection, and recovery capabilities; traditional mainframe RAS (reliability, availability, and scalability) for WebSphere. The other major focus of this announcement was to bring full integration of WebSphere distributed applications to the

mainframe zSeries environment. WebSphere Extended Deployment leverages WebServer Application z/OS for the development and integration of distributed applications with the mainframe ecosystem.

By addressing integration and availability issues, IBM has taken a further step to align WebSphere with the zSeries at the center of the on demand universe. Additionally, IBM has sharpened WebSphere differentiation against competitors such as Microsoft, SAP, BEA, and Oracle through Web services standards (e.g. JAX-RPC); availability, simultaneous detection, and recovery; and comprehensive business-driven development tools capabilities (e.g. generate code from process design). By contrast, Microsoft can only print Visio graphics where WebSphere provides for actual code generation. Others such as SAP NetWeaver are based on a proprietary stack, where WebSphere is a fully portable J2EE specification and Microsoft solutions are .NET based.

In our opinion WebSphere provides capabilities that put IBM in a leadership position in on demand computing. Both pure software plays, such as those by SAP, and traditional hardware software vendors, such as HP, have reason for concern. IBM is bringing a potent combination of both hardware and software to the customer's door, in an offering that is reasonably balanced between proprietary and open, with scalability from small to enterprise size. We should imagine that IBM's installed base, particularly those in the large enterprise space, are reassured by what IBM is offering. The IBM WebSphere solution offers a path for legacy application integration with the ongoing IT requirement for flexible, cost-contained service delivery, in line with rapidly changing business objectives. SMB customers are probably less content. The IBM high-availability, lights-out self-correcting and healing capabilities have yet to be extended to the SMB space, where such capabilities are as important, if not more so, than in large enterprises. The downside for all customers is, that although reasonably open, buy-in to WebSphere still represents acceptance of a certain philosophy and architectural commitment that can not be rapidly discarded for another alternative. Initial WebSphere experience seems to indicate that this is a sound alternative but the WebSphere mantle will be soundly tested by enterprises as they move forward with their strategic IT plans.



## IBM Announces New p5 Express Systems

*By Joyce Tompsett Becknell*

IBM has announced two members of the eServer p5 Express family of servers, the p5-520 Express and the p5-550 Express. Express systems are specially priced system configurations that require customers to purchase certain combinations of processors, memory, and disk drives. In return, customers get special pricing for selected items, depending on the system. The systems are priced lower than their normal counterparts and are capable of running AIX or SuSE or RedHat Linux.

IBM positions these systems for small and mid-market companies who want the power and capabilities of Power5 systems but need lower prices. Typically the processors in these systems run a little slower and they may have fewer options than their upmarket brethren. However, these Express systems do have all of the features of p5 systems including the sophisticated partitioning and virtualization. These systems follow on the heels of the p5-570 Express providing a full line of p5 Express systems for SMBs. The prices, as you might expect, fall between the OpenPower systems designed to run only Linux and the regular p5 family. Customers should be able to find a system close to their pricing and feature/function requirements from IBM at this point.

IBM has been offering Express versions of its hardware and software for awhile now, as it has found success amongst small and mid-market customers in particular with these systems. In addition IBM has OpenPower systems, which are designed to entice Linux users who might otherwise go to other platforms. These products are all designed to respond to pricing issues without actually initiating pricing wars between UNIX systems and x86-based systems. IBM continues to position its Power5-based systems as the industry standard for 64-bit computing. By offering a full range of products based on features and scalability as well as on pricing, the company ensures that it can appeal to the widest range of customers possible without sacrificing the leading-edge technologies that make 64-bit computing so appealing. If IBM can build ISV and

business partner excitement for these systems equal to the caliber of technology they offer, then it may give volume vendors a run for the customer's money.

## StorageTek Absorbs Storability

*By Joyce Tompsett Becknell*

This week StorageTek acquired Storability in an asset purchase transaction including all intellectual property, software license agreements, customer contracts, and other assets of Storability. StorageTek believes that seventy Storability employees will join the company. Storability provides storage resource management (SRM) software with its Global Storage Manager (GSM) product. The product allows users to measure and manage their storage resources with a centralized view of infrastructure and some policy-based automation of storage management. StorageTek has been Storability's only reseller partner and was responsible for approximately 75% of Storability's forty customers. Previously StorageTek had obtained Storability's Operations Center to launch its Remote Managed Storage service offering.

StorageTek was one of the first vendors to embrace the concept of information lifecycle management, and it did a good job of explaining what it meant before ILM became another marketing term used and abused by the industry. Oddly enough, StorageTek has been one of the last companies to adopt software targeting that ILM strategy, which has weakened its position somewhat. The purchase of Storability is a good first start, as it gives the company an SRM product that is already well understood within the company. The harder part will be that competitors such as EMC, Tivoli, and CreekPath are well ahead both in market share and in product functionality. It will also be interesting to see how far StorageTek goes with its software strategy. It still needs migration capabilities as well as more sophisticated provisioning capabilities. We'd assume the company would need to continue to buy versus build, as software has not been a core competency.

The other challenge for StorageTek will to get its channel to adopt and begin using the product. Previously StorageTek was Storability's only reseller, and although it drove the majority of the business, there are still relatively few customers with the solution. If the company can educate and train its channel properly, this can become a useful tool for StorageTek's channel to start conversations with existing tape customers and demonstrate to them that StorageTek is serious about being an ILM company and is building the pieces of the solutions to make this possible. It could become a useful way to get to know the customers better, as the customers can use GSM to get to know storage better.