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## Market Roundup

November 5, 2004

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### Sun Adds the StorEdge 6130 to the Low End of the StorEdge 6000 Offering

*By Rob Kidd*

Sun recently announced an addition to its StorEdge 6000 line. Sun's StorEdge 6130 is an entry-level product that features a spectrum of data services found in the high-end StorEdge 6920. Among these services are Data protection through Sun StorEdge Snapshot and Sun StorEdge Volume Copy Software, an Applications Oriented Management Utility, and Multiple storage-class deployments that accommodate Serial ATA and Fibre Channel. The StorEdge 6130 is designed to provide mid-sized businesses with enterprise-class business continuity, primary and secondary usage flexibility, disk-to-disk backup, and mixed storage classes with a tape backup for disk-in-the-middle solution, where the StorEdge 6130 acts as cache between primary storage and tape. The 6130 is due to be released in the middle of November as a replacement for the 6120, which will be phased out over time. No pricing details were announced.

The Sun StorEdge 6130 is OEMed from Engenio who also provides product to IBM, StorageTek, and Silicon Graphics. Sun's 6130 offering differs from the others in that it uses Sun Enterprise Storage Manager (ESM) instead of Engenio's SANtricity Software. ESM provides snapshot and volume copy capabilities that enable business continuity and support both Fibre Channel and SATA. IBM and HP have positioned their new disk-based storage offerings as "storage servers" by leveraging their existing servers and operating systems as the basis for disk-based storage solutions. Sun has now taken up this moniker as well. However, each vendor's product provides different functionality, with a different market positioning; there is no standard definition of what a storage server is. With the StorEdge 6000 line Sun is adding its name to the storage server party by taking a commonly OEMed product and adding its software and capabilities for differentiation. Sun has dubbed the StorEdge 6130 the "baby brother" of the StorEdge 6920 enterprise product by moving some of the 6920 functionality down-market for the value proposition. This allows mid-tier companies attractively priced access to data services from Sun that were previously only available in high-end servers.

Sun's storage revenues have been declining over the last several years, as has market share in relation to EMC, HP, and IBM. We see the StorEdge 6000 line as an attempt to regain some of the lost ground as the 6130 is targeting the lucrative and growing SMB storage market. It remains to be seen whether Sun's approach to storage servers will be enough to reverse the company's fortunes in the storage market. While other vendors are positioning storage servers as a strategic marketing message and product strategy, Sun appears to have taken a more tactical "me too" approach, which on the surface seems to indicate a shorter-term view of storage opportunities. Additionally, Sun does not control the platform that the product is built on unlike HP or IBM; thus the underlying server is subject to change beyond Sun's control and is not an industry-standard platform. Nevertheless, we believe that Engenio, for its part, would welcome Sun's success, as it might further accelerate Engenio's planned spinoff from its parent LSI Logic.

## Veritas Strengthens OpForce Capabilities

*By Joyce Becknell*

Veritas has released OpForce Enterprise Edition 4.0, its server-provisioning software, with new features and better integration. New features include application discovery for both pre-packaged and custom applications as well as application provisioning and configuration management to help simplify deployment, configuration, and management of heterogeneous servers. The software also provides remote operating system installation for Microsoft Windows 2000 Advanced Server and Microsoft Windows Server 2003 Enterprise Edition, as well as Red Hat Linux Advanced Server 3.0. On the integration front, Veritas extends support for Storage Foundation software for both Sun Solaris and IBM AIX servers, which ties storage and server management together for those operating environments. The company has also increased integration between BEA WebLogic Server and OpForce to automate enterprise application provisioning.

The trend toward integration and automation (sometimes known as virtualization just to keep marketing people busy) continues in the vendor community. Customers become tired of spending more time trying to make their systems work together than in taking advantage of those systems' capabilities. IT departments have drastically reduced spending on new stuff that doesn't have either improved integration or automated functionality, and vendors have responded swiftly with varying success. The benefit of buy-versus-build is that one has all the capabilities of the new software immediately, rather than waiting for teams of engineers to laboriously create something new. In fact, many specialty startup companies model themselves as attractive acquisitions for larger companies. At the same time, incorporating parts of other companies is difficult and takes time. Adopted products need a generation or two before they acquire the DNA of the parent company, and some (think HP and Bluestone) never get there. OpForce is one such product. It came to Veritas through the acquisition of Jareva at the end of 2002 and in its initial appearance was merely wearing Veritas credentials. This new version almost two years later, however, demonstrates the potential of what purchased technology can do to make vendors' products better if they take the time to integrate it properly.

Veritas, like EMC, Cisco, and IBM has hit on two key ideas. The company has realized that storage and servers are more closely linked than the industry might have previously admitted, and more importantly, that demand-driven computing — regardless of whether it's called Utility Computing, On Demand Computing or Information Lifecycle Management — is not going to work unless heterogeneous technologies, data, *and* applications can find common points of tangency in which to interact. Technology standards, APIs, and common protocols are one layer of solutions. Effective processes and automation of like tasks across unlike systems are another layer that has been harder to develop as they change based on industry, employee technology usage models, and geographic distribution among other variables. From this viewpoint, Veritas' OpForce development is yeoman's work that may be appreciated only by a handful of IT managers at first, but over time becomes the foundation required for businesses to truly build and leverage flexible, responsive IT infrastructure that can be leveraged to create real business value. The market is fragmented now; however, Sageza believes that over time, three or four leaders will arise that in concert will dominate the thought leadership for building demand-driven enterprises. Roadmaps for products like OpForce illustrate Veritas' desire and drive to be one of those key players.

## Next on the Hot Seat

*By Jim Balderston*

Novell has issued a warning concerning a security hole in the Linux 2.6 kernel that would allow hackers to shut down a system running a version of Linux based on the kernel. Novell owns SUSE Linux, which it acquired early this year, and so far is one of the few IT vendors to offer an enterprise product based on the 2.6 kernel. According to SUSE, the 2.6 kernel has problems with managing iptables-based firewalls, such as SUSEfirewall2. The bug affects SUSE Linux 9.1 and SUSE Linux Enterprise Server. Novell has issued a patch for the problem, and says the 2.6.8 Linux kernel has a fix already implemented in it.

While Microsoft has been rightfully admonished by the press and technical experts for the vast numbers of potential security flaws in its products, many other increasingly popular operating systems have seen little or no such scrutiny. Microsoft, being a large and (un)popular target, has issued few if any apologies, yet has dramatically shrunk its response time to such discoveries. The folks from Redmond have been in the security hot seat for some time and by now it just seems mildly warm, if not a bit toasty.

Other OS vendors have had their share of security holes, but none have had as many or as significant weak points exposed as Microsoft. But we believe that will change in the coming years as alternative operating environments become more pervasive and institutionalized. As this occurs, these too, will become targets not only of hackers but also “white hat” security experts, who will discover and then publicize their findings for the whole world to view. Linux will be no exception to this rule, and the higher-profile, commercialized Linux products will be especially desirable targets, especially if offered by large enterprise IT vendors. These vendors should ensure that their Linux partners are prepared for this coming wave of security scrutiny, and will be able to react to new revelations in a timely and customer-comforting fashion. Denying, dismissing, or downplaying security threats is no way to respond to security concerns. Just ask Microsoft.

## Putting a Stake in the Ground

*By Jim Balderston*

EMC demonstrated its new Storage Router last week, showing off its capability to move large amounts of data from one vendor’s storage array to another vendor’s with no downtime. The new router is software that sits on an intelligent switch. EMC demonstrated the router using both Brocade and Cisco switches while moving data from an EMC CLARiiON system to an HP EVA array. EMC officials said the router would support future McData products and future versions will support remote replication.

Where next? Storage and how to manage it in an increasingly complex IT environment is forcing various vendors out of their traditional spaces and into new areas in attempts to shape both present and future markets. EMC is no exception, with IBM, HP, and Hitachi all playing their cards in their own fashion. EMC is driving its own stake in the ground by offering a software router proving virtualization that allows all forms of stored data to be treated equally and moved into a variety of environments.

Of course EMC’s competitors are downplaying this latest foray. IBM says it’s way ahead in the virtualization game. Hitachi says that putting the router and virtualization intelligence in the switch is a mistake. While each company has its own point of view based on its own product decision, one thing remains clear: the need for effective storage, management, and access of stored data is going to continue to grow exponentially in the coming years. At the same time, storage hardware is becoming a commodity product with commensurate margins. EMC has realized this and has been extending its product suites — and margins — by offering extensive value-add on the software side. Will this router continue that trend? We’ll see. But one thing is for sure: there is no doubt that the debate over storage architecture is far from over. And as it rages, we expect to see plenty of innovation and advancements in storage value propositions, something that will benefit customers as they collect and amass ever-increasing amounts of data