

Market Roundup

July 20, 2007

EMC Announces Several New and Updated Solutions

SonicWALL Reinforces HP ProCurve's ProActive Defense Strategy

Security Information Management Simplified by Foudry/Lancope Linkup

IBM Reorganizes System i into Two New Business Units



EMC Announces Several New and Updated Solutions

By *Clay Ryder*

EMC Corporation has announced a new line-up of storage systems and software that seek to help customers store information more cost-effectively, securely, and intelligently. Among the products announced are the new EMC Symmetrix DMX-4 series of high-end storage arrays featuring an end-to-end 4GBps architecture, Fibre Channel point-to-point back-end, support for both FC and new low-cost 750 GB SATA II disk drives, double the replication distance when using EMC SRDF, and overall performance improvement of up to 30%. EMC Celerra NS20 and NS40 multi-protocol storage systems feature NAS and SAN connectivity through iSCSI or Fibre Channel, new Celerra Startup Assistant software, and support for 750GB SATA II disk drives, which reduce power consumption by up to 33%. The new Centera Generation 4 LP nodes offers 50% more capacity per node, reduces power and cooling requirements by 67% per TB by using new 750GB SATA disk drives, and provides new security features in the EMC CentraStar storage operating environment. New EMC CLARiiON CX3 storage system features a new CLARiiON FLARE operating environment with expanded compliance and audit features, new native iSCSI remote replication, RAID 6 protection, active/active failover, and support for 750GB SATA II disk drives. The company also introduced the Rainfinity File Management Appliance (FMA) that enables organizations to cost-effectively implement policy-based file management and automatically move and retrieve files across the entire NAS infrastructure including EMC Celerra, other NAS, and EMC Centera. In addition, customers can upgrade from the FMA to the full Rainfinity Global File Virtualization solution. Centera Generation 4 LP Nodes and the Rainfinity File Management Appliance are now available. The new Symmetrix DMX-4 series, new Celerra NS20 systems, Celerra multi-protocol NS40 systems, and CLARiiON enhancements will be available in August 2007. The updated CentraStar software and latest version of FLARE are available as a free upgrade to customers with maintenance contracts.

These announcements are impressive by sheer number alone; however, despite the broad range of capability and storage agility illustrated by EMC, there are a couple of overriding themes evident in these releases that to us epitomize the current state of the industry. These are the seemingly ubiquitous SATA II drive, and energy efficiency. The 750GB SATA II drive is one of the more interesting disk technologies in recent memory. This is not to say that it is a new and revolutionary technology in and of itself, but rather one that through its price/performance profile has altered some of the fundamental assumptions about "the right place" for storage technologies within the enterprise. Not that long ago, the mention of Symmetrix to most IT professionals would trigger visions of the essence of high-performance, mission-critical, some would even argue gold-plated (in the best sense of the words) storage solutions. The thought that the more modest SATA technology would ever take up residence in such a revered platform would be unthinkable. How rapidly times have changed.

Small SATA drives are affecting assumptions about the cost and performance of not just entry-level solutions, but the higher end as well. The combination of their high capacity and lower price points for drives and interconnects has resulted in a more cost-effective building block for storage solutions. Granted the absolute performance of

these drives is surpassed by other technologies, but for many, the performance is more than good enough. It is clear that EMC recognizes this, as these new drives are supported across the range of EMC solutions, from CLARiiON and Celerra, through Centerra and Symmetrix. This should provide the company not only flexibility in its product offerings to meet customer needs, but also some price competitiveness given reduced component costs and their ability to offer more storage within a single rack space.

The other aspect of SATA that is noteworthy is the 33% reduction in power consumption EMC is claiming for these drives. As organizations struggle to keep up with internal demand for storage while seeking to limit their exposure to escalating power costs, the ability to keep the number of drives in a storage array constant while gaining higher capacity should be welcome news. Multiply this across the multiple arrays common in larger organizations, and the potential for savings is considerable. Although much of the energy efficiency discussion in the datacenter has been focused on servers, the reality is that storage arrays also have a part to play in making the data center more eco friendly, especially considering these assets sometimes remain active long after servers of the same vintage have been retired/refreshed.

Overall, these announcements serve notice that the folks in Hopkinton remain focused not only on driving the market for their products, but also incorporating the best of what the market has to offer into their solutions. Whether this is through internal innovation, M&A activity, or incorporating state-of-the-art building blocks, it is clear that EMC is ready and willing to bring its competitive strengths to bear in its quest to be the assumed leader in delivering Information Infrastructure technology.

SonicWALL Reinforces HP ProCurve's ProActive Defense Strategy

By Lawrence D. Dietz

SonicWALL, Inc., a provider of network security, email security, secure remote access, and backup and recovery solutions, has announced an agreement to align with ProCurve Networking by HP to provide new levels of security price performance to enterprises worldwide. SonicWALL has joined the ProCurve Alliance, a recently announced program designed to offer customers security, mobility, and convergence solutions that have been tested and qualified for interoperability with ProCurve offerings. Through this alliance, SonicWALL will extend its award-winning Unified Threat Management technology into the ProCurve network environment, taking part in ProCurve's ProActive Defense strategy to secure networks against internal and external threats. In order to join the ProCurve alliance, SonicWALL completed a rigorous application process that includes technology certification to ensure solution interoperability, simplified deployment, and optimized performance.

ProCurve and SonicWALL are currently engaged on product certification, undertaking extensive testing to help ensure solution interoperability. The fundamentals of security call for dynamic, layered security as a requirement for all networks. Since many security threats originate within the LAN, deep packet inspection across every interface within the network is essential. Additionally, as networks become more dispersed, security needs to be armed at the edge as well as from the inside out. Through this collaboration, SonicWALL and its channel partners intend to support ProCurve's strategy of enabling customers to maintain the highest levels of security on every network segment without imposing a price penalty for premium performance. ProCurve's offerings provide network management solutions for network access control and threat detection and response, and SonicWALL's portfolio complements that of ProCurve by providing UTM features for WAN perimeter defense and deep packet inspection for internal threat defense. SonicWALL's UTM firewalls include the acclaimed PRO Series for mid-range deployments and the recently unveiled NSA E7500 multi-core UTM security platform, designed to provide network and data technology to larger networks, distributed enterprises, and data centers. The NSA E7500 is the flagship of SonicWALL's new E Class line of premium performance solutions, which also includes Email Security offerings and, through its acquisition of Aventail, a range of high-end SSL VPN solutions.

HP has been aggressively trying to expand into the middle market with its ProCurve line. The middle market is the most difficult of all segments because much of it defies description. On the lower end of this market where entities have between 100 and 200 employees, they exhibit the same buying patterns and concerns as small business. Furthermore, since these organizations may have only one or two people dedicated to the IT function, it is very unlikely that there is an inhouse information security specialist. As the organizations grow in size, their IT staff

grows as well, but their propensity to be heavily involved in remedial security measures does not. Middle market companies tend to be more concerned with avoiding problems than fixing them.

The key to success for this alliance is “a rigorous application process that includes technology certification to ensure solution interoperability, simplified deployment and optimized performance.” Buyers will likely feel that they can rely on the integrity of HP to ensure that these two families of products will interoperate as marketed and sold. In effect HP has taken the single point of contact responsibility through its certification of SonicWALL. Given the competitive and margin challenging market of UTM products, this is a way for SonicWALL to rise above the noise level as well. We believe this is a solid combination offering buyers a positive option for combining security and networking in an efficient manner.

Security Information Management Simplified by Foundry/Lancope Linkup

By *Lawrence D. Dietz*

Lancope, Inc., the provider of the StealthWatch System, a widely used Network Behavior Analysis and response solution, has announced that Foundry Networks, Inc., a performance and total solutions vendor for end-to-end switching and routing, has deployed the StealthWatch System to transform sFlow from Foundry's routers and switches into actionable network intelligence to optimize security and network operations. Unifying flow-based anomaly detection and network performance monitoring, StealthWatch provides detailed views of anomalies and network utilization to benefit Foundry's security analysts, network engineers, and network planners. Before deploying StealthWatch, Foundry already possessed networking expertise and high quality equipment, but its IT resources had the arduous and time-consuming task of reviewing log files to identify and remediate security and performance problems across its large, complex network. Foundry deployed StealthWatch to streamline network optimization and security into one process, without taxing internal resources or the network itself. The arrangement has reduced time required for problem resolution from four or five hours to one. The combination also has the secondary benefit of being able to monitor large data transfers and the users performing them. It is also possible to monitor who is accessing particular services and to identify, track, and report on end users responsible for suspicious activity, including the files they accessed and when they gained access.

Leveraging the existing network infrastructure, StealthWatch collects and analyzes Foundry's sFlow traffic statistics against more than 130 proprietary behavioral algorithms. The raw sFlow data is transformed into actionable network intelligence that governs blocking mechanisms within Foundry routers and switches. Foundry has deployed StealthWatch Xe for sFlow collector appliances, which aggregate high-speed network behavior data from multiple networks or network segments to extend protection across Foundry's geographically dispersed IT environment, and the StealthWatch IDentity-1000 appliance, which directly links individual users with specific network events. With StealthWatch to more easily identify the source of network issues, Foundry's IT staff is less dependent upon remedial tools to try to match users with the network services they utilize and the periodic, unexpected events they may cause. A member of Foundry's Security Alliance Program, Lancope previously collaborated with Foundry on StealthWatch Xe for sFlow, one of the industry's first sFlow-enabled anomaly detection systems. The appliance combines Lancope's award-winning StealthWatch security platform with Foundry's sFlow packet sampling technology to deliver a network-wide solution for anomaly detection without the costly deployment of sensors throughout the network. This approach provides a scalable and cost-effective method to provide total network visibility for IT Security managers and is complementary to security solutions such as firewalls, intrusion prevention systems, and other signature-based security appliances.

High-performance networks imply high levels of security and reliability. Network Operations Center personnel are often compared to FAA Air Traffic Controllers in the nature and pressure of their jobs. The NOC is charged not only with overseeing network operations, but with the overall security of the network and safeguarding organizational information assets as well. There is no question that networks generate an enormous amount of data and that it would be very useful to be able to sort through those mounds of data to see what can be done to optimize performance, and to determine whether there are nefarious activities afoot.

By employing specialized network behavior analysis capabilities, network owners are better able to detect potential problems than they would be relying solely on typical networking hardware and software. The ability to streamline network operations and security into a single process is the type of optimized process flow that large

end users in particular are looking for. If this can be accomplished with interoperable hardware and software in a single flow, organizations will likely benefit. Of course there is still the need for security specialists to analyze anomalous behavior and work with the NOC to reduce any potential negative impact; however, it would appear that this combination has simplified the overall process giving the end user organization an operational advantage.

IBM Reorganizes System i into Two New Business Units

By *Clay Ryder*

IBM has announced the reorganization of its System i product and management team into two new organizations, the Business Systems unit, and the Power Systems unit. The company stated that its System i business has split into two distinct client segments—large enterprise and small and medium business—each with its own set of requirements, and that it is undertaking this reorganization to better address the needs of the two communities. The new Business Systems unit will be led by Marc Dupaquier, and will be responsible for SMB integrated systems including the low-end System i products and will focus on the SMB client segment. This new unit will be work toward extending the System i capabilities to ensure continued relevance to small and medium businesses, and will build on the integrated, easy-to-use value proposition of i5/OS. The enterprise-focused Power Systems unit will be led by Ross Mauri, and will include all of the existing System p product line as well as the high-end System i 570 and 595 products. This unit will be focused on delivering leadership for POWER-based systems, including the value of the i5/OS operating environment and applications for larger enterprise clients. In addition, the company indicated that nearly half of its systems customers have i5/OS installed in their organization and that it believes the reorganization will help secure the investments that customers and partners have made in i5/OS applications by keeping i5/OS in the mainstream of IBM's future systems investments.

To the System i faithful, this announcement will likely be subject to considerable scrutiny and reexamination, in a fervent attempt to ascertain whether indeed the sky is falling. While organizational realignment is generally just a fact of corporate life, in the case of the System i, it is a closely watched and debated affair. To our way of thinking, the System i was overdue for some kind of change given the platform's overall market performance as of late. This is not to lay blame on the platform, but rather acknowledge the marketplace reality that the customer base has bifurcated into two separate and rather different camps. As such, the historic marketing approach for the platform was no longer in alignment with market realities and stymied attempts to grow the customer base. With this announcement, we do not see a diminishing role for the System i going forward, but rather the potential for the opposite, as the two customer constituencies can be now addressed in a more focused and relevant manner.

IBM's assertion that it wants to broaden the number of platforms where i5/OS reside makes a great deal of sense to us. From a hardware perspective there is scant different between the System p and System i, the OS and application support is what truly differentiates the System i. Bringing i5/OS to more platforms is not a harbinger of the death of the System i, but rather a reflection of the importance of the software stack to IBM, its ecosystem, and the customer base. If Big Blue was considering eliminating the System i, it could have simply relegated i5/OS as an option to the models 570 and 595 where its margins are considerably higher, and leave the lower end of the market with a migration decision. This is not evident in the reorganization announcement. Although one could postulate on the potential for this to happen in the future, the future is not yet written and the forces that shape the future are the decisions taken today. Therefore, it behooves all of us with an interest in this unique platform to accept that IBM is taking action with the hope of growing, not burying, the System i, and act and think accordingly. Inaction on the part of Big Blue would have led to only one possible outcome, and that outcome would have been far more onerous than learning to adapt to the changing waters of the marketplace.