
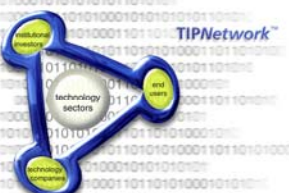


**Storage Decisions**

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## TheInfoPro (TIP) Storage Studies

Storage Decisions Panel, September 2005




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## TIPNetwork: End Users (Partial List)



- 150-250 Decision Makers interviewed in 6 month waves by key IT sector
- Average interview 1 hour
- TIPNetwork today in excess of 750 companies, government agencies & academic institutions

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## TheInfoPro (TIP) Storage Studies Overview

- Five Studies (Waves) to Date:
  - Wave 3: Released in February 2004
  - Wave 4: Released in September 2004
  - Wave 5: Released in March 2005
- Wave 5 Population:
  - 250+ one hour interviews with Storage Professionals
  - European & Mid-Market Component
  - 30 interviews with Institutional Investors
- Goals: Collect and deliver details on:
  - Future Buying Intentions
  - Vendor Performance
  - Budget Allocations
  - Technology Roadmaps
- Content Includes: Vendor ratings and detailed commentary on storage markets:
  - SAN
  - Switch
  - Backup Hardware & Software
  - Replication
  - NAS
  - Storage Network Management
  - Content Addressed Storage/ Fixed Content
  - Storage Resource Management

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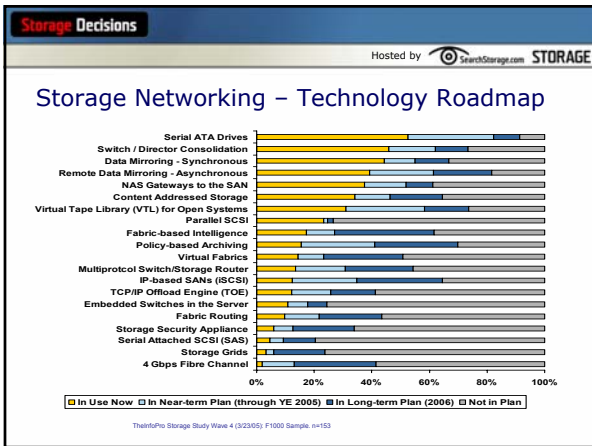
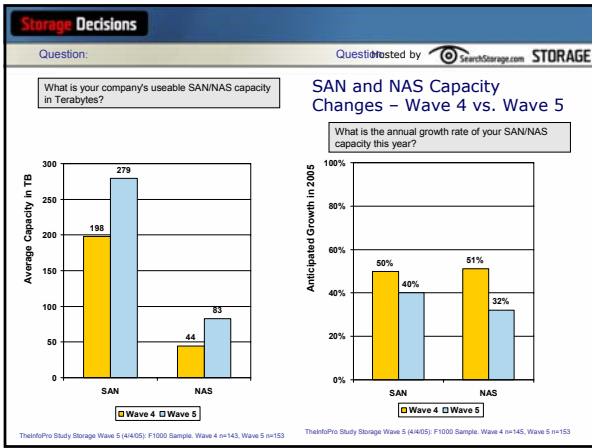
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### Storage networking technology Heat Index™ – lead in plan vendors

Technology	Score	Lead In Plan Vendor	2nd In Plan Vendor
Serial ATA Drives	100	EMC	HDS
Virtual Tape Library (VTL) for Open Systems	96	EMC	StorageTek
Policy-based Archiving	93	EMC	VERITAS
Remote Data Mirroring - Asynchronous	93	EMC	IBM
IP-based SANs (iSCSI)	82	EMC	Cisco
Multiprotocol Switch/Storage Router	69	Cisco	Brocade
NAS Gateways to the SAN	69	EMC	NetApp
Switch / Director Consolidation	61	Cisco	Brocade
Fabric Routing	61	Cisco	McDATA
Fabric-based Intelligence	60	Cisco	Brocade
Content Addressed Storage	56	EMC	NetApp
Data Mirroring - Synchronous	48	EMC	IBM
4 Gbps Fibre Channel	47	Brocade	McDATA
TCP/IP Offload Engine (TOE)	44	Emulex	QLogic
Virtual Fabrics	43	Cisco	McDATA
Storage Security Appliance	35	Datapel	EMC
Embedded Switches in the Server	18	IBM	Brocade
Serial Attached SCSI (SAS)	14	EMC	HDS
Storage Grids	13	EMC	NetApp
Parallel SCSI	0	EMC	HDS

1 Vendors have at least twice the number of responses as the closest competitor.

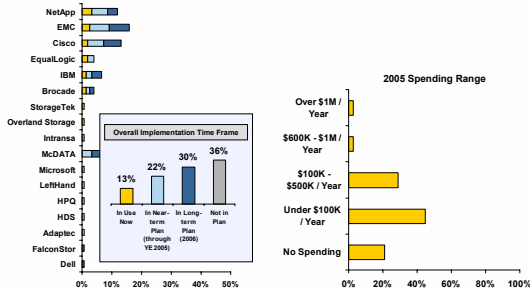
ThreatPro Storage Study Wave 5 (3/31/05); F1000 Sample, n=153

## Storage Networking Heat Index™ Change – Waves 3 to Wave 5

Technology	Wave 3 Rank	Wave 4 Rank	Wave 5 Rank
Serial ATA Drives	1	1	1
Virtual Tape Library (VTL) for Open Systems	16	5	2
Remote Data Mirroring - Asynchronous	3	4	4
IP-based SANs (iSCSI)	4	2	5
NAS Gateways to the SAN	10	9	7
Switch / Director Consolidation	8	8	8
Fabric-based Intelligence	N/A	12	10
Content-Addressed Storage	9	7	11
Data Mirroring – Synchronous	7	10	12
4 Gbps Fibre Channel	N/A	20	13
TCP/IP Offload Engine (TOE)	15	17	14
Storage Security Appliance	20	18	16

ThinkTPO Storage Study (7/29/05): F1000 Sample, Wave 3 (n=150), Wave 4 (n=152), Wave 5 (n=153)

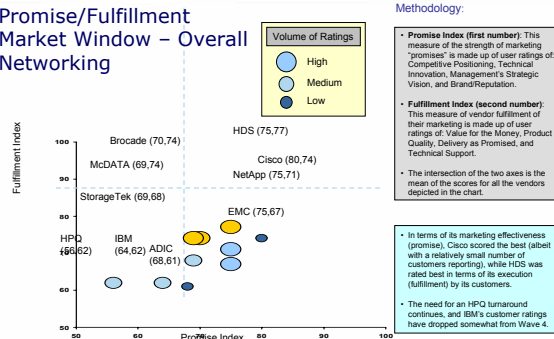
## IP-based SANs (iSCSI)



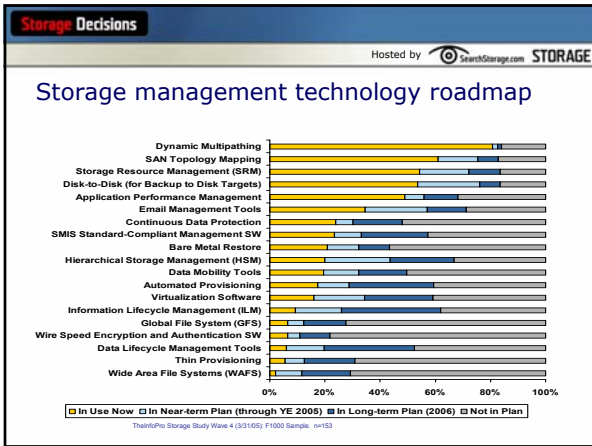
ThinkTPO Storage Study Wave 5 (3/31/05): F1000 Sample, n=152

ThinkTPO Storage Study Wave 5 (3/31/05): F1000 Sample, n=38

## Promise/Fulfillment Market Window – Overall Networking



ThinkTPO Storage Study Wave 5 (3/31/05): F1000 Sample, ADIC n=9, Brocade n=37, Cisco n=14, EMC n=81, HDS n=38, HPQ n=26, IBM n=25, McDATA n=38, NetApp n=1, StorageTek n=24



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### Storage Management Technology Heat Index™ - Lead In Plan Vendors

Technology	Score	Lead In Plan Vendor	2nd In Plan Vendor
Email Management Tools	100	EMC <sup>†</sup>	VERITAS
Disk-to-Disk (for Backup to Disk Targets)	91	EMC	StorageTek
Hierarchical Storage Management (HSM)	91	EMC	VERITAS
Information Lifecycle Management (ILM)	81	EMC <sup>†</sup>	VERITAS
Storage Resource Management (SRM)	78	EMC	HDS(AppIQ)
Virtualization Software	75	EMC	IBM
Automated Provisioning	66	EMC <sup>†</sup>	IBM
SAN Topology Mapping	60	EMC <sup>†</sup>	McDATA
SMIS Standard-Compliant Management SW	58	EMC	HDS(AppIQ)
Data Lifecycle Management Tools	57	EMC <sup>†</sup>	VERITAS
Data Mobility Tools	55	EMC	IBM
Application Performance Management	31	VERITAS <sup>†</sup>	EMC
Bare Metal Restore	29	VERITAS <sup>†</sup>	IBM
Wide Area File Systems (WAFS)	27	Cisco <sup>†</sup>	Tacit
Thin Provisioning	27	EMC <sup>†</sup>	NetApp
Continuous Data Protection	24	EMC	Oracle
Dynamic Multipathing	14	EMC	Cisco
Global File System (GFS)	1	IBM <sup>†</sup>	VERITAS
Wire Speed Encryption and Authentication SW	0	Cisco <sup>†</sup>	Brocade

<sup>†</sup> Vendors have at least twice the number of responses as the closest competitor.  
Theris/Pro Storage Study Wave 4 (3/31/05); F1000 Sample; n=153

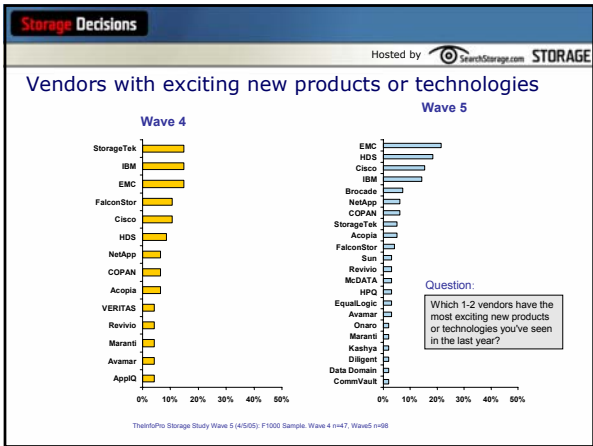
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### Storage Management Heat Index™ Change - Waves 3 to Wave 5

Technology	Wave 3 Rank	Wave 4 Rank	Wave 5 Rank
Email Management Tools	8	5	1
Disk-to-Disk (for Backup to Disk Targets)	2	1	2
Hierarchical Storage Management (HSM)	18	8	3
Information Lifecycle Management (ILM)	17	2	4
Storage Resource Management (SRM)	1	4	5
Automated Provisioning	13	12	7
SAN Topology Mapping	4	9	8
Application Performance Management	N/A	15	12
Continuous Data Protection	N/A	19	16
Dynamic Multipathing	N/A	18	17

Theris/Pro Storage Study (7/29/05); F1000 Sample; Wave 3:n=150, Wave 4:n=152, Wave 5:n=153






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### Questions?

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- **212-672-0011**
- [www.theinfopro.net](http://www.theinfopro.net)

**Thank you!**

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