The Future Of Converged Infrastructure And Integrated Systems

Report 1: Competitive Analysis

Scope

This report profiles the following vendors of converged infrastructure and integrated systems (CI and IS): Cisco, Dell, EMC, Fujitsu, Hitachi, HP, Huawei, IBM, NetApp, Oracle, SAP and VMware. In addition, CI and IS alliances and channel initiatives such as VCE and FlexPod are profiled and discussed. Bull, Teradata and Unisys are included in the competitive landscape. The geographic scope of the research is Europe, Middle East and Africa, although we also have reports covering worldwide, the Americas and Asia Pacific for those who need them.

This competitive analysis report is part of a series of three, which includes user perspectives (report 2) and market sizing and forecast (report 3).

Target audience and questions answered

- Systems vendors - gain insight into your competitors Enterprise, Data centre and CI and IS strength, weaknesses, focus areas, positioning and roadmap
- Software or computing management platform vendors - gain insight into server, storage and networking infrastructure usage, strategies and trends
- Storage or networking vendors - gain insight into server and software infrastructure usage, strategies and trends
- Start up vendors - get insight into market opportunities not yet addressed by established vendors
- Data centre infrastructure manager or service provider CTOs - get insight into your peers' wants and needs, vendor roadmaps and vendor strengths and weaknesses

Details and price

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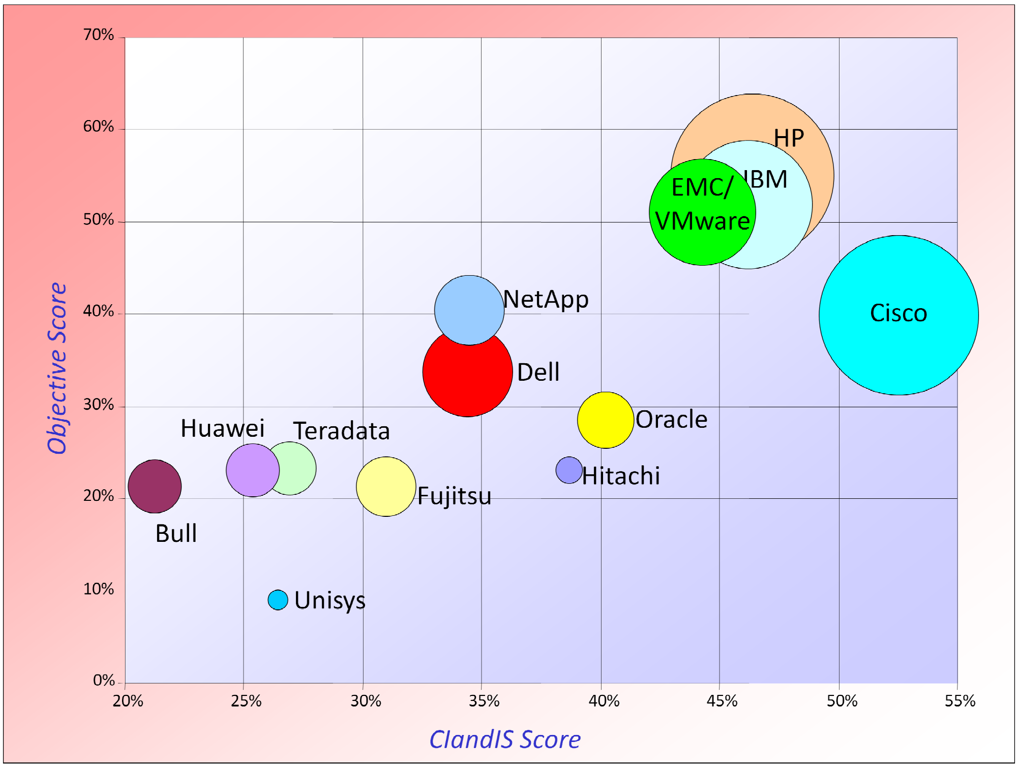
Highlights



Our research culminates into a snapshot overview of the competitive landscape for CI and IS vendors in EMEA. Our scoring is based on their size in the overall IT market and in data centre offerings - the 'objective score' shown on the 'Y' axis, which takes a number of EMEA performance factors for each company and their current sales success and our assessment of their ability to deliver our target offerings shown as the 'CiandIS score' on the 'X' axis. The size of each vendor circle relates to the size of their revenues from data centre products in EMEA. More specifics are available in the report.

The four largest competitors include **HP**, which has built its data centre strategy on its own industry standard offerings and the widest channel partner choice; however it lacks focus, generically using 'converged' to describe any number of products. **IBM**, which launched PureSystems in April 2012 and is focusing on a variety of layers; it has been particularly successful in selling its Flex Systems to MSPs and in launching a number of workload-optimised systems using its own applications. **EMC** is a major player through its ownership of **VMware** which is used for virtualisation in the vast majority of systems shipped by all vendors to date; its leadership of the storage market and strong partnership with **Cisco** for vBlock also add to its strength. **Cisco** has a full set of offerings and partnerships, having launched UCS in 2008 and partnering strongly with **VMware** and parent **EMC** for vBlock and with **NetApp** for FlexPod. Of the other competitors **Dell** is best positioned to move towards the top right of the chart due to its strong data centre revenues, a clearly thought-out strategy and strong sales team.

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