

HPE Competitive News Summary – November 27, 2019

Cisco

Dell EMC

IBM

Lenovo,
Huawei

Pure,NetApp,
Nutanix

Other

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Important note: The HPE Competitive Weekly has migrated to the Seismic NewsCenter on the “Competitive Intelligence” Channel as the primary delivery mechanism. Visit hpe.seismic.com to read the “HPE Competitive Weekly” news summary in the Seismic NewsCenter, Competitive Intelligence Channel.

Cisco

- **Is Cisco Systems Still On The Right Route?**
 - <https://www.fool.com/investing/2019/11/25/is-cisco-systems-still-on-the-right-route.aspx>
- **Cisco: There aren't enough humans for cloud-native infra. Can DevOps deal?**
 - <https://siliconangle.com/2019/11/25/arent-enough-humans-cloud-native-infra-can-devops-deal-kubecon/>
- **Cisco: Cloud gaming is a 'killer use case' for 5G**
 - <https://www.rcrwireless.com/20191126/5g/cisco-cloud-gaming-a-killer-use-case-for-5g>
- **Cisco Boasts 20,000 SD-WAN Customers**
 - <https://www.sdxcentral.com/articles/news/cisco-boasts-20000-sd-wan-customers/2019/11/>
- **Cognitive Confusion: Demystifying Cisco Collaboration**
 - <https://www.uctoday.com/collaboration/cognitive-confusion-demystifying-cisco-collaboration/>

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Dell EMC / VMware / Pivotal

- **Dell's Server Sales Slump Continues**
 - Server & Networking down 16%, Storage up 7%
<https://www.crn.com/news/data-center/dell-s-server-sales-slump-continues>
 - Dell pumps up storage revs in Q3
"MidRange.Next...completed by the end of the [Dell] fiscal year and it will be released"
"Forecast storage market slowdown. Sweet said: "But my job is to do better than that; outperform the marketplace."
<https://blocksandfiles.com/2019/11/27/dell-q3-fy2020-storage-revenues/>
 - Dell Lowers Annual Sales Forecast on Weak Server Demand
<https://www.datacenterknowledge.com/dell/dell-lowers-annual-sales-forecast-weak-server-demand>
 - Dell Posts Mixed Q3 Amid RSA Sale Rumors
<https://www.sdxcentral.com/articles/news/dell-posts-mixed-q3-amid-rsa-sale-rumors/2019/11/>
 - Dell earnings top expectations, but sales come up a little shy
<https://www.marketwatch.com/story/dell-earnings-top-expectations-but-sales-come-up-a-little-shy-2019-11-26-16914437>
 - Dell Q3 mixed as server, networking sales slide
<https://www.zdnet.com/article/dell-q3-mixed-as-server-networking-sales-slide/>
 - Despite VMware boost, Dell misses revenue targets as US-China trade tensions bite
<https://siliconangle.com/2019/11/26/dell-misses-q3-revenue-targets-u-s-china-trade-tensions-bite/>
 - Dell Technologies Q3 2020 Results - Earnings Call Transcript
<https://seekingalpha.com/article/4309352-dell-technologies-inc-dell-q3-2020-results-earnings-call-transcript>
 - Strong Storage, VMware and PC Performance Power Dell Technologies' Third Quarter Results
<https://investors.delltechnologies.com/static-files/e0dcc80f-ba24-4c8b-94a4-257c705fd5d1>
 - Dell Technologies Fiscal Year 2020 Third Quarter Results
<https://investors.delltechnologies.com/events/event-details/dell-technologies-fiscal-year-2020-third-quarter-results>

- **Big Vendors Blame Macroeconomics for Weak Data Center Hardware Sales**
 - <https://www.datacenterknowledge.com/business/big-vendors-blame-macroeconomics-weak-data-center-hardware-sales>
- **Dell is exploring sale of its RSA cybersecurity unit**
 - <https://www.hindustantimes.com/tech/dell-is-exploring-sale-of-its-rsa-cybersecurity-unit/story-BAOmcZRK0LJnR0z2LCBD7I.html>
 - Dell to Explore Sale of RSA Cybersecurity Unit
<https://www.bloomberg.com/news/articles/2019-11-25/dell-is-said-to-explore-sale-of-rsa-cybersecurity-unit>
 - Dell Investigating Sale Of RSA Security For At Least \$1 Billion: Report
<https://www.crn.com/news/security/dell-investigating-sale-of-rsa-security-for-at-least-1-billion-report>
 - Dell to explore sale of RSA Security
<https://techcentral.co.za/dell-to-explore-sale-of-rsa-security/94309/>
- **Dell: Deleveraging To Unlock Significant Value**
 - <https://seekingalpha.com/article/4309302-dell-deleveraging-unlock-significant-value>
- **Dell urges partners to 'buckle up' for onslaught of data demands**
 - <https://www.channelweb.co.uk/crn-uk/news/3084262/dell-execs-rally-partners-to-buckle-up-for-onslaught-of-data-demands>
- **Dell Technologies advances its networking portfolio with Dell EMC VEP1405 Series**
 - <https://www.crn.in/news/dell-technologies-advances-its-networking-portfolio-with-dell-emc-vep1405-series/>
- **Dell: Why data can be the key to your business transformation**
 - <https://www.techradar.com/uk/news/dell-why-data-can-be-the-key-to-your-business-transformation>
- **Accelerating Cloud Provider Route to Market with Dell Technologies Cloud**
 - <https://www.webwire.com/ViewPressRel.asp?ald=250650>
- **Dell Tech's 2030 Goals Show Social Impact Makes Business Sense**
 - <https://www.sdxcentral.com/articles/opinion-editorial/dell-techs-2030-goals-show-social-impact-makes-business-sense/2019/11/>
- **Dell Tools Up for Automated On-Demand Computing with PowerOne**
 - <https://techspective.net/2019/11/25/dell-tools-up-for-automated-on-demand-computing-with-powerone/>
- **Dell EMC veteran takes charge of New Relic in region**
 - <https://sg.channelasia.tech/article/669072/dell-emc-veteran-takes-charge-new-relic-region/>
- **VMware Q3 solid as it aims to integrate Carbon Black, Pivotal**
 - <https://www.zdnet.com/article/vmware-q3-solid-as-it-aims-to-integrate-carbon-black-pivotal/>
 - VMware earnings beat amid acquisitions of Pivotal, Carbon Black
<https://www.marketwatch.com/story/vmware-earnings-beat-amid-acquisitions-of-pivotal-carbon-black-2019-11-26>
 - VMware's Cloud Pivot Paying Off, as SaaS Revenue Soars
<https://www.marketwatch.com/story/vmware-earnings-beat-amid-acquisitions-of-pivotal-carbon-black-2019-11-26>
 - VMware Reports Fiscal Year 2020 Third Quarter Results
<https://ir.vmware.com/overview/press-releases/press-release-details/2019/VMware-Reports-Fiscal-Year-2020-Third-Quarter-Results/default.aspx>
- **VMware Aims For Container Dominance**
 - *"Combining VMs and containers allows customers to modernize their infrastructure while maintaining existing investments in applications, tools and skillsets, Gelsinger said"*
<https://www.crn.com/news/cloud/vmware-aims-for-container-dominance>
 - VMware doubles up on Kubernetes play
<https://www.computerweekly.com/news/252474575/VMware-doubles-up-on-Kubernetes-play>
- **VMware Announces Sales Leadership Changes**
 - <https://www.streetinsider.com/Globe+Newswire/VMware+Announces+Sales+Leadership+Changes/16183597.html>
- **Will VMware Achieve its Goal by Focusing on SMEs?**
 - <https://www.siliconindia.com/news/business/Will-VMware-Achieve-its-Goal-by-Focusing-on-SMEs-nid-211209-cid-3.html>
- **VMware Cloud on AWS cost and capabilities -- then vs. now**

- o <https://searchvmware.techtarget.com/tip/VMware-Cloud-on-AWS-cost-and-capabilities-then-vs-now>
- **VMware to add BitFusion GPU Virtualization to HPC Capabilities**
 - o <https://insidehpc.com/2019/11/vmware-to-add-bitfusion-gpu-virtualization-to-hpc-capabilities/>
- **VMware vSphere monitoring ensures system health, performance**
 - o <https://searchservervirtualization.techtarget.com/tip/VMware-vSphere-monitoring-ensures-system-health-performance>
- **Why Cenitex turned to HCI, VMware Cloud on AWS for 'Program Fortify'**
 - o <https://www.computerworld.com.au/article/669002/cenitex-leans-hci-vmware-cloud-aws-program-fortify/>

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IBM

- **Is IBM Ready for a Big Surge?**
 - o <https://www.fool.com/investing/2019/11/24/is-ibm-ready-for-a-big-surge.aspx>
 - o 2 Reasons IBM's Sales Will Rise in 2020
<https://newyork.citybizlist.com/article/584281/2-reasons-ibms-sales-will-rise-in-2020>
 - o IBM Has Its Head In The Clouds
<https://www.fool.com/investing/2019/11/25/ibm-has-its-head-in-the-clouds.aspx>
- **IBM paid \$34B for this: Where Red Hat is taking OpenShift**
 - o <https://www.zdnet.com/article/ibm-paid-34b-for-this-where-red-hat-is-taking-openshift/>
 - o IBM-Red Hat Strategy Yields Latest Cloud Pak for Security
<https://www.channelfutures.com/security/ibm-red-hat-strategy-yields-latest-cloud-pak-for-security>
 - o IBM and Red Hat: How's that going?
<https://www.itweb.co.za/content/6GxRKMY81zA7b3Wj>
- **SC19: IBM Changes Its HPC-AI Game Plan**
 - o <https://www.hpcwire.com/2019/11/25/sc19-ibm-changes-its-hpc-ai-game-plan/>
- **IBM Launches Open Technology to Speed Response to Cyber Threats Across Clouds**
 - o <http://www.dbta.com/Editorial/News-Flashes/IBM-Launches-Open-Technology-to-Speed-Response-to-Cyber-Threats-Across-Clouds-135399.aspx>
 - o IBM Advances Security in Hybrid Cloud, Multicloud World
<https://www.channelnomics.com/2019/11/25/ibm-advances-security-in-hybrid-cloud-multicloud-world/>
- **IBM says data and security solutions drove double digit growth of its cloud business in India**
 - o <https://www.businessinsider.in/tech/news/ibm-says-data-and-security-solutions-drove-double-digit-growth-of-its-cloud-business-in-india/articleshow/72216700.cms>
- **No developerWorks Content Will Be Left Behind, IBM Promises**
 - o <https://www.itjungle.com/2019/11/25/no-developerworks-content-will-be-left-behind-ibm-promises/>
- **IBM's AI Helps to Unearth Hidden Nasca Lines**
 - o <https://www.hpcwire.com/2019/11/25/ibms-ai-helps-to-unearth-hidden-nasca-lines/>
- **Look Who's Driving Disruptive Innovation in the Cloud: IBM!**
 - o <https://cloudwars.co/ibm-driving-disruptive-innovation-cloud/>
- **Take a Big Blue cheque and go: IBM settles 281 UK age discrim cases**
 - o https://www.theregister.co.uk/2019/11/25/ibm_uk_settles_281_age_discrimination_cases/
- **Cenovus Energy Selects IBM to Boost Digital Transformation with SAP**
 - o <https://www.prnewswire.com/news-releases/cenovus-energy-selects-ibm-to-boost-digital-transformation-with-sap-300964263.html>

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Lenovo / Huawei

- **Huawei CEO: We can still be No.1 without Google**
 - o <https://www.cnn.com/2019/11/26/tech/huawei-smartphone-ren-zhengfei/index.html>
- **Huawei: Trouble overseas but boom time in China**

- <https://www.bbc.com/news/business-50515426>
- **Huawei and ZTE barred from FCC Universal Service Fund**
 - <https://www.zdnet.com/article/huawei-and-zte-barred-from-fcc-universal-service-fund/>
 - FCC Bans Huawei, ZTE From USF-Funded Projects
<https://www.sdxcentral.com/articles/news/fcc-bans-huawei-zte-from-usf-funded-projects/2019/11/>
 - Huawei ban: Full timeline as FCC bars Chinese companies from billions in federal subsidies
<https://www.cnet.com/news/huawei-ban-full-timeline-fcc-federal-subsidies-china-trump-ban-security-threat-mate-x/>
 - The FCC declares gear from Huawei and ZTE ineligible for U.S. subsidies
<https://www.post-gazette.com/business/tech-news/2019/11/24/US-Huawei-ZTE-FCC-bar-federal-subsidies-telecom-funds-regulators-Chinese/stories/201911230070>

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Pure / NetApp / Nutanix

- **NetApp and Google Cloud deepen strategic partnership**
 - <https://datacenternews.us/story/netapp-and-google-cloud-deepen-strategic-partnership>
 - NetApp and Google Cloud advance Strategic Partnership to Drive Innovation in the Cloud
<https://www.itp.net/business/90544-netapp-and-google-cloud-advance-strategic-partnership-to-drive-innovation-in-the-cloud>
- **NetApp's Data Management Strategy for Federal IT**
 - <https://www.governmentciomedia.com/netapps-data-management-strategy-federal-it>
- **2019 winners of NetApp's A/NZ partner awards**
 - <https://channellife.co.nz/story/2019-winners-of-netapp-s-a-nz-partner-awards>
- **Cloud and container management tools from Pure Storage address need for simplicity**
 - <https://siliconangle.com/2019/11/25/cloud-and-container-management-tools-from-pure-storage-address-need-for-simplicity-kubecon/>
- **Pure Storage cloud sales surge, but earnings miss the target**
 - <https://searchstorage.techtarget.com/news/252474519/Pure-Storage-cloud-sales-surge-but-earnings-miss-the-target>
- **After a successful transition to software, Nutanix sees stock jump 21%**
 - <https://siliconangle.com/2019/11/25/successful-transition-nutanix-stock-jumps-21/>
 - Nutanix loves HPE (and Wall Street loves Nutanix)
"In the earnings call Pandey singled out the partnership with HPE."
<https://blocksandfiles.com/2019/11/26/nutanix-q1fy2020-earnings/>
 - Nutanix Stock Skyrockets 21% After Earnings
<https://www.crn.com/news/data-center/nutanix-stock-skyrockets-21-after-earnings>
 - Nutanix Q1 Wows Wall Street, CEO Warns Bloody Oceans Ahead
<https://www.sdxcentral.com/articles/news/nutanix-q1-wows-wall-street-ceo-warns-bloody-oceans-ahead/2019/11/>
 - Nutanix: There have always been losses. You know what's really fattening? Our subs
<https://www.theregister.co.uk/2019/11/26/nutanix/>
 - Nutanix Stock Spikes on Better-Than-Expected Revenue and Billings
<https://www.barrons.com/articles/nutanix-stock-revenue-and-billings-results-51574719683>
 - 5 Reasons Why Nutanix Stock Is Soaring
<https://www.crn.com/slide-shows/data-center/5-reasons-why-nutanix-stock-is-soaring>
 - Nutanix Reports First Quarter Fiscal 2020 Financial Results
<https://ir.nutanix.com/company/press-releases/press-release-details/2019/Nutanix-Reports-First-Quarter-Fiscal-2020-Financial-Results/default.aspx>
- **Tarkan Maner joins Nutanix as chief commercial officer**
 - <https://www.itp.net/business/90506-tarkan-maner-joins-nutanix-as-chief-commercial-officer>
- **Nutanix Mine with HYCU Now Available**
 - <https://finance.yahoo.com/news/nutanix-mine-hycu-now-available-133000109.html>

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Other

- **AWS Launches JEDI Cloud Counteroffensive**
 - <https://www.crn.com/news/cloud/aws-launches-jedi-cloud-counteroffensive>
 - Amazon Challenges Pentagon's \$10B JEDI Award
<https://www.sdxcentral.com/articles/news/amazon-challenges-pentagons-10b-jedi-award-2/2019/11/>
- **Anthos: Google's bid for Kubernetes differentiation ... and market share**
 - *"Google claim, "Customers don't want open-source K8s in production... the reality is that open source K8s... are the de facto standards, not vendor-specific expanded versions, even when they come from Google"*
https://www.theregister.co.uk/2019/11/26/anthos_googles_bid_for_kubernetes_differentiation/
- **Analysts Say Kubernetes Is a Services-Building Opportunity for the Channel**
 - <https://www.channelfutures.com/open-source/analysts-say-kubernetes-is-a-services-building-opportunity-for-the-channel>
 - Oracle, Red Hat See the Value of Kubernetes for Channel Partners
<https://www.channelfutures.com/open-source/oracle-red-hat-see-the-value-of-kubernetes-for-channel-partners>
- **Google Cloud's Bare Metal Solution Aims at Legacy Workloads with Baggage**
 - <https://www.datacenterknowledge.com/google-alphabet/google-cloud-s-bare-metal-solution-aims-legacy-workloads-baggage>
- **For #1 Microsoft and other Cloud Powerhouses, a Thanksgiving Gratitude List**
 - <https://cloudwars.co/microsoft-cloud-wars-top-10-thanksgiving-gratitude/>
 - Predictions 2020: Cloud computing sees new alliances and new security concerns
<https://www.zdnet.com/article/predictions-2020-cloud-computing-sees-new-alliances-and-new-security-concerns/>
- **Oracle looks to grow multi-model database features**
 - <https://searchdatamanagement.techtarget.com/feature/Oracle-looks-to-grow-multi-model-database-features>
- **Oracle v. Google and Its Impact on APIs and Code**
 - <https://devops.com/oracle-v-google-and-its-impact-on-apis-and-code/>
- **Oracle complains it's forced to source local cyber staff from offshore**
 - <https://www.itnews.com.au/news/oracle-complains-its-forced-to-source-local-cyber-staff-from-offshore-534553>
- **Oracle's largely white board draws congressional scrutiny**
 - https://www.unionleader.com/news/business/oracle-s-largely-white-board-draws-congressional-scrutiny/article_4179120c-75fe-5897-8677-6b7c29e57e5a.html
- **AWS: 5G Is 'Not the Holy Grail of IoT'**
 - <https://www.sdxcentral.com/articles/news/aws-5g-is-not-the-holy-grail-of-iot/2019/11/>
- **Azure Arc: Managing hybrid cloud deployment**
 - <https://www.techrepublic.com/article/azure-arc-managing-hybrid-cloud-deployment/>
- **Enterprise Software and Cloud Services Demand Remains Strong as Hardware Slumps**
 - <https://realmoney.thestreet.com/investing/technology/enterprise-software-cloud-services-demand-versus-hardware-15182779>
- **Liquid Announces \$28M Series B Funding for Industry-leading Composable Infrastructure Solutions**
 - <https://financial-news.co.uk/liquid-announces-usd-28m-series-b-funding-for-industry-l/>
- **Cloud-native DevOps gets real with new tools**
 - <https://techbeacon.com/enterprise-it/cloud-native-devops-gets-real-new-tools>
- **Palo Alto Networks acquires Aporeto for cloud security**
 - <https://www.zdnet.com/article/palo-alto-networks-acquires-aporeto-for-cloud-security/>
- **A Successful Cloud Migration Starts with Understanding Business Needs**
 - <https://biztechmagazine.com/article/2019/11/successful-cloud-migration-starts-understanding-business-needs>
- **Scale Computing 'Magic': Edge Device Application Breakthrough**
 - <https://www.crn.com/news/cloud/scale-computing-magic-edge-device-application-breakthrough>

- **Earnings announcements:**

- IBM Q4 2019 - January 21 (preliminary)

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- **HPE Competitive Intelligence published several new deliverables in the past week, and these are available here:**
hpe.seismic.com in the “**Competitive Intelligence**” tile (internal portal)