

HPE competitive news summary – October 19, 2018

Cisco

Dell EMC

IBM

Lenovo,
Huawei

Pure,NetApp,
Nutanix

Other

(un)subscribe

prev. editions

Get access to the HPE Competitive Weekly in the [Seismic NewsCenter](#)

Cisco

- **Cisco Bets AI Will Be Deployed On-Premises**
 - <https://www.rtinsights.com/cisco-bets-ai-will-be-deployed-on-premises/>
 - **HPE Positioning** vs Cisco UCS C480 ML M5 – targeted for AI/ML Workloads
https://hpe.sharepoint.com/sites/B1/EG/competition/Competitive_library/Cisco_C480ML_M5_Server.pdf
- **Cisco raises "grave concerns" over Australian Assistance and Access Bill**
 - <https://www.arnnet.com.au/article/648206/cisco-raises-grave-concerns-over-assistance-and-access-bill/>
 - Government encryption bill: Cisco, Mozilla join chorus of tech critics
<https://www.computerworld.com.au/article/648215/government-encryption-bill-cisco-mozilla-join-chorus-tech-critics/>
 - Australian encryption-busting Bill would create backdoors: Cisco
<https://www.zdnet.com/article/australian-encryption-busting-bill-would-create-backdoors-cisco/>
- **Cisco Promotes Sage to Global Position**
 - <https://www.channelpartneronline.com/2018/10/15/cisco-promotes-sage-to-global-position/>
- **Cisco says WebEx is totally fixed now (except for two problems)**
 - <https://www.crn.com.au/news/cisco-says-webex-is-totally-fixed-now-except-for-two-problems-514040>
- **Cisco CEO Chuck Robbins on Why Corporate Social Responsibility Is Becoming Obsolete**
 - <http://fortune.com/2018/10/15/cisco-ceo-chuck-robbins-csr/>
- **Come on, Cisco bug-hunters: No terrifying critical vulns? Are you saving for Halloween?**
 - https://www.theregister.co.uk/2018/10/18/cisco_security_fixed/
- **Arista Grabs Pentagon Pact As Cisco Protests Deal, Says Analyst**
 - <https://www.investors.com/news/technology/arista-pentagon-contract-cloud-computing-cisco-protest/>
- **Arista Embraces Its Mojo in Campus Battle With Cisco**
 - <https://www.sdxcentral.com/articles/news/arista-embraces-its-mojo-in-campus-battle-with-cisco/2018/10/>

[Back to Top](#)

Dell EMC / VMware / Pivotal

- **Carl Icahn Slams Dell VMware Stock Swap, Says Dell Creating 'Fear Campaign**
 - <https://www.crn.com/news/data-center/carl-icahn-slams-dell-vmware-stock-swap-says-dell-creating-fear-campaign>
 - Carl Icahn Wants to Fight Dell Again
<https://www.bloomberg.com/view/articles/2018-10-16/carl-icahn-wants-to-fight-dell-again>
 - Activist investor Carl Icahn slams Dell VMware stock swap
<https://www.crn.com.au/news/activist-investor-carl-icahn-slams-dell-vmware-stock-swap-513991>
 - Icahn Says He Will 'Do Everything in My Power' to Stop Dell-VMware Deal
<https://www.sdxcentral.com/articles/news/icahn-says-he-will-do-everything-in-my-power-to-stop-dell-vmware-deal/2018/10/>
 - Icahn Takes a Stand Against Dell Plan to Return to Public Markets
<https://www.bloomberg.com/news/videos/2018-10-15/icahn-takes-a-stand-against-dell-plan-to-return-to-public-markets-video>
 - Icahn to Dell investors: You can't touch this reverse merger with VMware
https://www.theregister.co.uk/2018/10/15/icahn_to_dell_no_you_cant_reverge_merge_with_vmware/

- Icahn challenges Dell on planned deal with VMware
<https://www.bizjournals.com/newyork/news/2018/10/15/icahn-challenges-dell-on-planned-deal-with-vmware.html>
- Carl Icahn Blasts 'Scare Tactics' From Dell in \$21.7 Billion Tracker Stock Deal
<https://www.thestreet.com/technology/carl-icahn-blasts-scare-tactics-from-dell-in-21-7-billion-tracker-stock-deal-14744133>
- Michael Dell's showdown with nemesis Carl Icahn can be traced back to EMC deal
<https://www.bostonglobe.com/business/2018/10/16/michael-dell-showdown-with-nemesis-carl-icahn-can-traced-back-emc-deal/8CwXPxajmbuwwAH95atdeL/story.html>
- **Dell Fires Back At Icahn: VMware Stock Swap 'In The Best Interests' Of Shareholders**
 - <https://www.crn.com/news/data-center/dell-fires-back-at-icahn-vmware-stock-swap-is-in-the-best-interests-of-shareholders>
 - Dell Tech: We'll let shareholders vote on VMware reverse merger in Q4
https://www.theregister.co.uk/2018/10/16/dell_tech_to_let_shareholders_vote_on_vmware_reverse_merger_in_q4/
 - Dell to Icahn: Buzz Off
https://www.lightreading.com/enterprise-cloud/infrastructure-and-platform/dell-to-icahn-buzz-off/d/d-id/746881?_mc=RSS_LR_EDT
 - Dell hits back at investor, will set stock swap date
<https://www.crn.com.au/news/dell-hits-back-at-investor-will-set-vmware-stock-swap-date-514064>
 - Dell maintains plans to go public despite opposition
<https://www.iol.co.za/business-report/companies/dell-maintains-plans-to-go-public-despite-opposition-17515546>
- **Dell plans December 11 vote on tracking stock buyback**
 - <https://seekingalpha.com/news/3398922-dell-plans-dec-11-vote-tracking-stock-buyback>
 - Dell to take \$21.7 billion tracking stock offer to December vote
<https://finance.yahoo.com/news/dell-21-7-billion-tracking-133729048.html>
- **Great Lakes Supercomputer from Dell EMC Coming to University of Michigan**
 - <https://insidehpc.com/2018/10/great-lakes-supercomputer-dell-emc-coming-university-michigan/>
 - Dell EMC to Supply U Michigan's Great Lakes Cluster
<https://www.hpcwire.com/2018/10/16/dell-emc-to-supply-u-michigans-great-lakes-cluster-project/>
 - U-M Selects Dell EMC, Mellanox and DDN to Supply New 'Great Lakes' Computing Cluster
<https://www.hpcwire.com/off-the-wire/u-m-selects-dell-emc-mellanox-and-ddn-to-supply-new-great-lakes-computing-cluster/>
- **Dell EMC Releases Cyber Recovery Software**
 - https://www.storagereview.com/dell_emc_releases_cyber_recovery_software
 - Dell EMC Cyber Recovery Software Delivers Last Line of Data Protection Defense Against Cyber Attacks
<https://www.prnewswire.com/news-releases/dell-emc-cyber-recovery-software-delivers-last-line-of-data-protection-defense-against-cyber-attacks-300732663.html>
- **Dell EMC to support AI knowledge sharing and VR adoption**
 - <https://www.tahawultech.com/vendor/dell-emc-to-support-ai-knowledge-sharing-and-vr-adoption/>
- **Dell bullish on enterprise-level businesses in China**
 - <http://usa.chinadaily.com.cn/a/201810/19/WS5bc9beada310eff30328373e.html>
 - Taiwan at midrange level for business digital transformation, says Dell survey
<https://www.digitimes.com/news/a20181019PD206.html>
- **Dell EMC's Steve Harris: Booz Allen's Mobility Tech to be Deployed Across More Dell Laptops**
 - <https://www.govconwire.com/2018/10/dell-emcs-steve-harris-booz-allens-mobility-tech-to-be-deployed-across-more-dell-laptops/>
- **Emaratech drives smart transformation efforts forward with dell EMC**
 - https://www.zawya.com/mena/en/story/emaratech_drives_smart_transformation_efforts_forward_with_dell EMC-ZAWYA20181015052840/
- **10 Coolest VMware Tools And Updates You Need To Know About**
 - <https://www.crn.com/slide-shows/networking/10-coolest-vmware-tools-and-updates-you-need-to-know-about>
- **Hybrid Cloud Is Here To Stay But Requires A Fundamental Security Change, Says VMware**
 - <https://which-50.com/hybrid-cloud-is-here-to-stay-but-requires-a-fundamental-security-change-says-vmware/>

- **IBM Falls Short In Q3, Snapping Its Growth Streak**
 - <https://www.crn.com/news/cloud/ibm-falls-short-in-q3-snapping-its-growth-streak>
 - IBM talks 'emerging, high value segments' – so you know the Q3 numbers aren't great
https://www.theregister.co.uk/2018/10/17/ibm_q3_2018_expectations/
 - IBM Falls Most in Four Years After Quarterly Earnings Disappoint
<https://www.bloomberg.com/news/articles/2018-10-16/ibm-misses-sales-estimates-casting-doubt-on-new-growth-engines>
 - IBM's Nascent Revenue Streak Is at Risk
<https://www.wsj.com/articles/ibms-nascent-revenue-streak-is-at-risk-1539682200>
 - IBM: How About a CEO Change?
<https://seekingalpha.com/article/4212181-ibm-ceo-change>
 - IBM falls after revenue misses
<https://www.cnbc.com/2018/10/16/ibm-earnings-q3-2018.html>
 - IBM sees cognitive solutions, tech services and cloud platform revenue declines
<https://www.zdnet.com/article/ibm-sees-cognitive-solutions-tech-services-and-cloud-platform-revenue-declines/>
 - After Q3 Revenue Slowdown, Can IBM Finish The Year On A Strong Note?
<https://www.forbes.com/sites/greatspeculations/2018/10/17/after-q3-revenue-slowdown-can-ibm-finish-the-year-on-a-strong-note/#13772a37c972>
 - IBM: Stop Obsessing On Revenues
<https://seekingalpha.com/article/4212016-ibm-stop-obsessing-revenues>
 - IBM is shrinking again, and so is its stock price
<https://www.marketwatch.com/story/ibm-is-shrinking-again-and-so-is-its-stock-price-2018-10-16>
 - IBM misses sales estimates as new growth doubts emerge
<https://www.bnnbloomberg.ca/ibm-misses-sales-estimates-as-new-growth-doubts-emerge-1.1153427>
 - IBM revenue misses as server, software sales slow
<https://www.reuters.com/article/us-ibm-results/ibm-revenue-misses-as-server-software-sales-slow-idUSKCN1MQ2R8>
- **IBM finally proves that quantum systems are faster than classicals**
 - <https://www.engadget.com/2018/10/18/ibm-math-proof-quantum-computers-shor-algorithm/>
 - IBM Proves Quantum Computers Can Be Faster Than Classical Ones
<https://www.tomshardware.com/news/ibm-quantum-computers-faster-classical,37957.html>
- **IBM Multicloud Manager Enhances Big Blue's Hybrid Posture**
 - <https://www.crn.com/news/cloud/ibm-multicloud-manager-enhances-big-blue-s-hybrid-posture>
 - IBM Launches Open Cloud And AI Tools Aimed At Radical Simplicity For Businesses
<https://www.forbes.com/sites/bobevans1/2018/10/15/ibm-launches-open-cloud-and-ai-tools-aimed-at-radical-simplicity-for-businesses/#21e99d246266>
 - IBM spits out one cloud manager to rule them all
https://www.theregister.co.uk/2018/10/16/ibm_multicloud_manager/
 - IBM Wants its Cloud Services to Play Nice With Competitors
<https://www.datacenterknowledge.com/ibm/ibm-wants-its-cloud-services-play-nice-competitors>
 - IBM Takes Aim at Nutanix With Multicloud Manager
<https://www.fool.com/investing/2018/10/15/ibm-takes-aim-at-nutanix-with-multicloud-manager.aspx>
 - IBM Multicloud Manager aims to simplify working across multiple cloud environments
<http://www.cloudpro.co.uk/cloud-essentials/hybrid-cloud/7719/ibm-multicloud-manager-aims-to-simplify-working-across-multiple>
 - IBM Unveils World's First Multicloud Management Technology
<https://newsroom.ibm.com/2018-10-15-IBM-Unveils-Worlds-First-Multicloud-Management-Technology>
- **IBM brings elastic licensing to mainframes**
 - <https://www.crn.com.au/news/ibm-brings-elastic-licensing-to-mainframes-513872>
- **IBM officially launches POWER9 in SA**

- o <https://www.itweb.co.za/content/Pero3MZgnoGqQb6m>
- **IBM and NVIDIA further collaboration to advance open source GPU acceleration**
 - o <https://www.ibm.com/blogs/systems/ibm-and-nvidia-further-collaboration-to-advance-open-source-gpu-acceleration/>
- **IBM Takes Cybersecurity Training on the Road**
 - o <https://www.nytimes.com/2018/10/15/business/ibm-takes-cybersecurity-training-on-the-road.html>
 - o IBM taking cybersecurity on the road in a sleek tractor-trailer. One of its first stops: the National Mall.
<https://www.bizjournals.com/washington/news/2018/10/15/ibm-taking-cybersecurity-on-the-road-in-a-sleek.html>
- **IBM eyes server maintenance business opportunity in Greater China**
 - o <https://www.digitimes.com/news/a20181012PD209.html>
- **How VMware is leaning on IBM and AWS to go all-in on cloud**
 - o <https://www.arnnet.com.au/article/648225/how-vmware-leaning-ibm-aws-go-all-in-cloud/>
- **The Power8 Era Is Drawing To A Close**
 - o <https://www.itjungle.com/2018/10/15/the-power8-era-is-drawing-to-a-close/>

[Back to Top](#)

Lenovo / Huawei

- **Lenovo and Scale Pitch Hyperconverged Boxes for the Edge of Enterprise Networks**
 - o <https://www.datacenterknowledge.com/hyper-convergence/lenovo-and-scale-pitch-hyperconverged-boxes-edge-enterprise-networks>
 - o Lenovo, Scale Computing launch jointly developed edge platform
<https://www.datacenterdynamics.com/news/lenovo-scale-computing-launch-jointly-developed-edge-platform/>
 - o Lenovo and Scale Computing Collaborate to Solve Edge Infrastructure Challenges for Retailers
<https://www.lenovoxperience.com/#/!newsDetail/283yi044hzgdcv7snkrmmx9oozqdiggt6e7viku4qpo9haqp>
- **IBM, Lenovo Bring Watson to Call Centers**
 - o <https://www.enterprisetech.com/2018/10/18/ibm-lenovo-bring-watson-to-call-centers/>
 - o IBM Snags \$240 Million AI Deal
<https://www.fool.com/investing/2018/10/18/ibm-snags-240-million-ai-deal.aspx>
 - o IBM Services Signs \$240M Agreement with Lenovo to Help Drive the Future of its Call Centers with Artificial Intelligence
<https://newsroom.ibm.com/2018-10-18-IBM-Services-Signs-240M-Agreement-with-Lenovo-TM-to-Help-Drive-the-Future-of-its-Call-Centers-with-Artificial-Intelligence>
- **Lenovo partner updates highlight deal reg, customer focus**
 - o <https://www.channelnomics.com/channelnomics-us/news/3064556/lenovo-partner-updates-aim-to-imrpove-deal-reg-customer-focus>
- **Microsoft and Huawei partnership seeks to accelerate hybrid cloud deployment**
 - o <https://www.neowin.net/news/microsoft-and-huawei-partnership-seeks-to-accelerate-hybrid-cloud-deployment/>
- **Huawei Wins Business Transformation Award and Nominated for Innovation Technology Award at the IoT Solutions World Congress 2018**
 - o <http://www.prnewswire.co.uk/news-releases/huawei-wins-business-transformation-award-and-nominated-for-innovation-technology-award-at-the-iot-697999021.html>
- **US semiconductor company claims Huawei tried to steal its technology**
 - o <https://www.engadget.com/2018/10/18/us-semiconductor-company-claims-huawei-stealing-technology/>
 - o Ex-Huawei man claims Chinese giant is suing his startup to 'surpass' US tech dominance
https://www.theregister.co.uk/2018/10/19/huawei_cnex_ip_theft_lawsuit/
- **Huawei AI Fabric Raises Ethernet to a New Level of Ultra-High-Speed and Lossless Performance**
 - o <https://markets.businessinsider.com/news/stocks/huawei-ai-fabric-raises-ethernet-to-a-new-level-of-ultra-high-speed-and-lossless-performance-1027615541>
- **Huawei Releases the AI Developer Enablement Program**
 - o <https://menafn.com/1097563448/Huawei-Releases-the-AI-Developer-Enablement-Program>

[Back to Top](#)

Pure / NetApp / Nutanix

- **Technologies To Look into at NetApp Insight 2018**

- <https://virtualizationreview.com/articles/2018/10/04/technologies-at-netapp-insight-2018.aspx>
- NetApp Insight 2018: October 22-24
<https://insight.netapp.com/>
- **Goldman Sachs Turns Bullish On NetApp, Upgrades Pure Storage To Neutral**
 - <https://www.benzinga.com/analyst-ratings/analyst-color/18/10/12521726/goldman-sachs-turns-bullish-on-netapp-upgrades-pure-sto>
- **Bringing cloud simplicity to enterprise data centers – the SureSkills and Nutanix way**
 - <https://www.techcentral.ie/bringing-cloud-simplicity-to-enterprise-data-centres-the-sureskills-and-nutanix-way/>
- **Varonis Talks Data Security and Exhibits at NetApp Insight 2018**
 - <https://globenewswire.com/news-release/2018/10/17/1622733/0/en/Varonis-Talks-Data-Security-and-Exhibits-at-NetApp-Insight-2018.html>
- **Fujitsu and NetApp's NFLEX Converged Infrastructure now Certified for SAP Environments**
 - <http://bwcio.businessworld.in/article/Fujitsu-and-NetApp-s-NFLEX-Converged-Infrastructure-now-Certified-for-SAP-Environments/18-10-2018-162487/>
- **Salinas Valley Memorial Healthcare System Implements Pure Storage Solution to Improve Patient Care and Increase Staff Productivity**
 - <https://www.prnewswire.com/news-releases/salinas-valley-memorial-healthcare-system-implements-pure-storage-solution-to-improve-patient-care-and-increase-staff-productivity-300731642.html>

[Back to Top](#)

Other

- **The tech giants, the US and the Chinese spy chips that never were... or were they?**
 - <https://www.theguardian.com/commentisfree/2018/oct/13/tech-giants-us-chinese-spy-chips-bloomberg-supermicro-amazon-apple>
 - The security community increasingly thinks a bombshell Bloomberg report on Chinese chip hacking could be bogus
<https://www.businessinsider.com/security-community-voicing-increasing-doubts-about-bombshell-bloomberg-chinese-chip-hacking-2018-10>
 - US intel chief doubts Bloomberg's chip spy story
<https://seekingalpha.com/news/3398964-us-intel-chief-doubts-bloombergs-chip-spy-story>
 - Apple CEO Tim Cook Is Calling For Bloomberg To Retract Its Chinese Spy Chip Story
<https://www.buzzfeednews.com/article/johnpaczkowski/apple-tim-cook-bloomberg-retraction>
 - **HPE Positioning: Bloomberg Reporting on Super Micro**
<https://hpe.seismic.com/Link/Content/NC3pDKs5JPe0SCuQ7Bvwhocg>
- **Oracle buys goBalto to expand Health Sciences business**
 - <https://www.zdnet.com/article/oracle-buys-gobalto-to-expand-health-sciences-business/>
- **Thought Patch Tuesday was a load? You gotta check out this Oracle mega-advisory, then**
 - https://www.theregister.co.uk/2018/10/16/oracle_patch_bundle/
- **Our processor tech's got legs, says Arm: 'One million' data center servers will ship in 2018**
 - https://www.theregister.co.uk/2018/10/17/arm_data_center_servers/
 - Arm doodles server, comms CPUs in public before they leak out in open-source code...
https://www.theregister.co.uk/2018/10/16/arm_neoverse_infrastructure/
- **Azure goes quiet, Huawei Canada ban urged, US Senators are after Google, and more**
 - https://www.theregister.co.uk/2018/10/13/security_roundup_131018/
- **Amazon's sexist AI recruiter, Nvidia gets busy, Waymo cars rack up 10 million road miles**
 - https://www.theregister.co.uk/2018/10/13/ai_roundup_131018/
- **Elastifile ClearTier allows cloud tiering for burst workloads**
 - <https://www.computerweekly.com/news/252450259/Elastifile-ClearTier-allows-cloud-tiering-for-burst-workloads>
 - Elastifile adds automated tiering to cloud object storage
<https://searchstorage.techtarget.com/news/252450791/Elastifile-adds-automated-tiering-to-cloud-object-storage>
- **Hitachi storage technologies underpin AI and cloud plans**
 - <https://searchstorage.techtarget.com/news/252450646/Hitachi-storage-technologies-underpin-AI-and-cloud-plans>
- **Violin Systems To Acquire X-IO Storage Business**
 - <https://www.crn.com/news/storage/violin-systems-to-acquire-x-io-storage-business>

- Violin Acquires X-IO Storage, Axellio Spun Off
https://www.storagereview.com/violin_acquires_xio_storage_axellio_spun_off
- Violin buys Axellio, X-IO splits
<https://searchstorage.techtarget.com/news/252450739/Violin-buys-Axellio-X-IO-splits>
- Violin Systems gnaws off X-IO Technologies' storage arm
https://www.theregister.co.uk/2018/10/16/violin_buys_xio_for_second_array_product_line/
- **NVMe-oF fends off scale-out storage challenges**
 - <https://searchstorage.techtarget.com/feature/NVMe-oF-fends-off-scale-out-storage-challenges>
- **Cloud Storage From HPE, Google And Hitachi Vantara**
 - <https://www.forbes.com/sites/tomcoughlin/2018/10/16/cloud-storage-from-hpe-google-and-hitachi-vantara/#5cc2e81b68c9>
- **Juniper advances network automation community, skillsets**
 - https://www.theregister.co.uk/2018/10/08/intel_security_commitment/
- **Outside of Japan, Fujitsu KILLS the K5 cloud with 'immediate effect'**
 - https://www.theregister.co.uk/2018/10/15/fujitsu_kills_the_k5_cloud_with_immediate_effect/
- **Xilinx To Compete With Intel, NVIDIA On Datacenter AI Acceleration**
 - <https://www.forbes.com/sites/paulteich/2018/10/15/xilinx-to-compete-with-intel-nvidia-on-datacenter-ai-acceleration/#2c52fb871b6e>
- **Enterprise IoT security sucks so much, it's made Intel and Arm work together to tackle it**
 - https://www.theregister.co.uk/2018/10/15/intel_arm_iot/
- **News Bits: Zadara, SolarWinds, Kaminario, WD, Arcserve, Supermicro, & More**
 - https://www.storagereview.com/news_bits_zadara_solarwinds_kaminario_wd_arcserve_supermicro_more
- **IDC: 5 Things You Didn't Know About Tech Spending**
 - <https://blogs.idc.com/2018/10/11/5-things-you-didnt-know-about-tech-spending/>
- **Serverless? There's more than one way to run a function**
 - https://www.theregister.co.uk/2018/10/15/serverless_theres_more_than_one_way_to_run_a_function/
- **The Future of the Cloud Depends on Magnetic Tape**
 - <https://www.bloomberg.com/news/articles/2018-10-17/the-future-of-the-cloud-depends-on-magnetic-tape>
- **Earnings announcements:**
 - Cisco F1Q19: November 14

[Back to Top](#)

- **HPE Competitive Intelligence published several new deliverables in the past week, and these are available here:**
<https://hpe.seismic.com/X5/DocCenter.aspx> in the "Competitive Information" tile (internal portal)