

## HPE Competitive News Summary – December 13, 2019

Cisco

Dell EMC

IBM

Lenovo,  
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Nutanix

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### Cisco

- **Cisco makes a bold play in the silicon space, bows new router series**
  - <https://www.fiercetelecom.com/telecom/cisco-makes-a-bold-play-silicon-space-bows-new-router-series>
  - Cisco Intros Cisco Silicon One: New ASIC Play Beyond The Network Into The Cloud  
<https://www.crn.com/news/networking/cisco-intros-cisco-silicon-one-new-asic-play-beyond-the-network-into-the-cloud>
  - Cisco Systems Goes Big On The ‘Next’ Internet  
<https://www.forbes.com/sites/moorinsights/2019/12/11/cisco-systems-goes-big-on-the-next-internet/#138c10eb32a3>
  - Cisco Aims to Change Economics of the Internet  
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  - Cisco unveils ‘Internet for the future’ silicon breakthrough  
<https://gadget.co.za/cisco-unveils-internet-for-the-future/>
  - Cisco slips on a Tolkien ring: One chip design to rule them all, one design to find them. One design to bring them all...  
[https://www.theregister.co.uk/2019/12/11/cisco\\_silicon\\_architecture/](https://www.theregister.co.uk/2019/12/11/cisco_silicon_architecture/)
  - Cisco Puts Its Chips in a New Game  
<https://www.wsj.com/articles/cisco-puts-its-chips-in-a-new-game-11576160398>
  - Cisco says its new silicon, software, router products will 'change the economics of the Internet'  
<https://www.bizjournals.com/sanjose/news/2019/12/11/cisco-silicon-new-products.html?ana=yahoo&yptr=yahoo>
  - Cisco Stock: Shift To Sell Chips To Impact Broadcom, Arista, Juniper?  
<https://www.investors.com/news/technology/cisco-stock-cisco-sell-semiconductors-broadcom/>
- **Cisco Down Two Execs As One Reportedly Jumps To John Chambers-Backed Pensando**
  - <https://www.crn.com/news/networking/cisco-down-two-exec-as-one-reportedly-jumps-to-john-chambers-backed-pensando>
  - Cisco loses two senior VPs  
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  - Former CIO exec, data center sales head leaving Cisco  
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  - Cisco loses CIO and data centre sales leader  
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- **Gartner Magic Quadrant For WAN Edge Infrastructure: Cisco Loses Leader Position, Aruba Makes Its Debut**
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- **AWS, Cisco ‘Easing Pain Into The Cloud’ With AWS Outposts Support, SD-WAN Tie-Ins**
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- **What’s hot for Cisco in 2020**
  - <https://www.networkworld.com/article/3487831/what-s-hot-for-cisco-in-2020.html>
- **As cloud transformation gathers pace, Cisco sees big opportunity in multicloud**
  - <https://siliconangle.com/2019/12/11/cloud-transformation-gathers-pace-cisco-sees-big-opportunity-multicloud/>
- **Inside Cisco's IT monitoring makeover**
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- **10 Ways Cisco Has Made the World a Better Place**
  - <https://www.nojitter.com/vendor-news/10-ways-cisco-has-made-world-better-place>

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## Dell EMC / VMware / Pivotal

- **HPE Puts Heat On Dell In Server Market-Share Battle**
  - <https://www.crn.com/slide-shows/data-center/hpe-puts-heat-on-dell-in-server-market-share-battle>
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<https://finance.yahoo.com/news/idc-posts-q3-server-market-135301836.html>
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- **Microsoft, Dell CTOs on the Digital Innovation Frontier**
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  - VMware is a 'hybrid monster' in cloud computing, analyst says, and its stock will climb  
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<https://www.wamc.org/post/new-ibm-supercomputer-installed-rpi>
  - IBM's latest supercomputer will be used... to build even more computers  
<https://www.zdnet.com/article/ibms-latest-supercomputer-will-be-used-to-build-even-more-computers/>
- **Intel Hires Former GlobalFoundries CTO, IBM Chip Exec Gary Patton**
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- **IBM X-Force simulates worst-day scenario**
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## Lenovo / Huawei

- **Lenovo and Intel Partner for VSC-4 Supercomputer in Vienna**
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- **Huawei 5G kit in Faroe Islands: Chinese ambassador 'linked Huawei contract to ... trade deal' – report**
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- **IDC: NetApp Tanks, Huawei Banks As Storage Industry Realigns**
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## Other

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<https://news.yahoo.com/san-francisco-expensive-oracle-moving-193521946.html>
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- **Amazon tech VP lays out ambitious AWS storage vision**
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- **Worldwide Converged Systems Market Grows 3.5% Year Over Year During the Third Quarter of 2019, According to IDC**
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  - **Get to know storage-as-a-service providers and their offerings**
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  - **UCaaS Vendor Fuze Changes Leadership, Strategy**
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  - **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](https://hpe.seismic.com) in the "Competitive Intelligence" tile (internal portal)