

HPE competitive news summary – January 04, 2019

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 Will Be Big Winner From Increased Huawei Scrutiny, Says JPMorgan**
 - <https://www.thestreet.com/technology/cisco-to-be-big-winner-from-huawei-scrutiny-jpmorgan-note-says-14824816>
 - Cisco Could Reap Benefits On Increased Huawei Security Fears, JP Morgan Says
<https://www.crn.com/news/networking/cisco-could-reap-benefits-on-increased-huawei-security-fears-jp-morgan-says>
- **Forget Cisco. Arista Networks Is a Better Data Center Stock**
 - <https://www.fool.com/investing/2019/01/03/forget-cisco-arista-networks-is-a-better-data-cent.aspx>
- **Cisco Stock Rose in 2018 by Avoiding Drama**
 - <https://www.barrons.com/articles/cisco-stock-2018-51546020143>
- **What Can We Expect from Cisco This Year?**
 - <https://marketrealist.com/2019/01/what-can-we-expect-from-cisco-this-year>
- **For \$40, there won't be a Cisco networking question that you can't answer**
 - <https://thenextweb.com/offers/2018/12/31/for-40-there-wont-be-a-cisco-networking-question-that-you-cant-answer/>

[Back to Top](#)

Dell EMC / VMware / Pivotal

- **Dell returns to market with NYSE listing**
 - <https://www.reuters.com/article/us-dell-ipo/dell-returns-to-market-with-nyse-listing-idUSKCN1OR14E>
 - Dell returns to public markets after 6 years
<https://venturebeat.com/2018/12/28/dell-returns-to-public-markets-after-6-years/>
 - Dell's Decision To Return To Public Trading
<https://seekingalpha.com/article/4230736-dells-decision-return-public-trading>
 - Is Dell Technologies Undervalued? Billionaire Michael Dell Returns to the Public Market
<https://www.forbes.com/sites/siliconangle/2018/12/28/is-dell-technologies-undervalued-billionaire-michael-dell-returns-to-the-public-market/#6bfd37c4cf0e>
 - 5 Things To Know About The New Public Dell And Dell's Stock
<https://www.crn.com/slide-shows/data-center/5-things-to-know-about-the-new-public-dell-and-dell-s-stock>
 - Dell Technologies Returns To The Market
https://www.storagereview.com/dell_technologies_returns_to_the_market
 - Bank Of America Sees Dell Stock Price Climbing To \$63
<https://www.crn.com/news/data-center/bank-of-america-sees-dell-stock-price-climbing-to-63>
 - Dell Returns as a Public Company, But Better Deals Await Tech Investors
<https://www.thestreet.com/opinion/dell-stock-looks-fairly-valued-14821652>
 - Dell Public Stock: Will Shareholders Demand Quarterly Profits?
<https://www.channele2e.com/business/finance/will-dell-shareholders-demand-quarterly-profits/>
 - Dell Shareholders Win as Company Reopens on NYSE
<https://www.thestreet.com/technology/dell-shareholders-win-as-company-reopens-in-the-new-york-stock-exchange-14821568>
 - Dell's Public Debut Produces Fresh Winners and Losers
<https://www.barrons.com/articles/dell-buys-out-vmware-tracker-goes-public-51546020573>

- Dell Runs the Gauntlet to Achieve Its Goal of Going Public
<https://www.sdxcentral.com/articles/news/dell-runs-the-gauntlet-to-achieve-its-goal-of-going-public/2018/12/>
- Dell Technologies Completes Class V Transaction
<https://www.prnewswire.com/news-releases/dell-technologies-completes-class-v-transaction-300771234.html>
- **Marius Haas On Dell EMC Besting HPE And 2019 Channel Partner Strategy**
 - <https://www.crn.com/slide-shows/cloud/marius-haas-on-dell-emc-besting-hpe-and-2019-channel-partner-strategy>
- **Dell EMC portfolio is goldmine for our channels: Tian Beng Ng**
 - <https://www.idgconnect.com/news/1500872/dell-emc-portfolio-goldmine-channels-tian-beng-ng>
- **Dell EMC Bullish on 2019 Outlook**
 - <http://businessweekme.com/dell-emc-bullish-on-2019-outlook/>
- **Dell EMC spills beans on plans for storage-class memory in PowerMax**
 - https://www.theregister.co.uk/2018/12/21/scm_power_to_the_max/
- **2019: The Year of the Data-Driven Digital Ecosystem**
 - <https://www.delltechnologies.com/en-us/perspectives/2019predictions/>
- **Dell EMC better watch out, HPE better not frown, Chinese server sales are talk of the town**
 - https://www.theregister.co.uk/2018/12/21/chinese_trio_ship_more_servers_than_dell_emc_hpe/
- **Tech predictions for 2019: Dell India's perspective**
 - <https://www.crn.in/thought-leader/tech-predictions-for-2019-dell-indias-perspective/>
- **Will VMware lead the newly public Dell Technologies?**
 - <https://blog.architecting.it/will-vmware-lead-dell/>
- **Here's What's Going On With VMware and Dell Today**
 - <https://www.fool.com/investing/2018/12/31/heres-whats-going-on-with-vmware-and-dell-today.aspx>
- **VMware bods – you back at work yet? Guess who's just poked their head into the software-defined data centre...**
 - https://www.theregister.co.uk/2019/01/04/acronis_sddc/

[Back to Top](#)

IBM

- **IBM makes Spectrum Scale play nicely with software containers**
 - https://blocksandfiles.com/2019/01/02/ibm_spectrum_scale_container_software_integration/
- **Suse, Red Hat, IBM, SAP: It's Linux Versus Linux Now**
 - <https://e3zine.com/2019/01/03/linux-versus-linux-suse-ibm/>
- **Red Hat and Partners Collaborate To Accelerate Hybrid Architectures**
 - <https://e3zine.com/2018/12/25/red-hat-hybrid-architectures/>
- **It's Interesting How IBM's AI Debater Sways Opinions, But Who Wins - Man Or Machine?**
 - <https://www.forbes.com/sites/cognitiveworld/2018/12/31/its-interesting-how-ibms-ai-debater-sways-opinions-but-who-wins-man-or-machine/#4b6a33c93528>
- **Buy IBM Stock as It Begins 2019 as the Cheapest Dow Component**
 - <https://www.thestreet.com/investing/stocks/buy-ibm-stock-as-it-begins-2019-as-the-cheapest-dow-component-14821881>
- **Ex-employee accuses IBM of 'longstanding and pervasive' age discrimination**
 - <https://westfaironline.com/110022/ex-employee-accuses-ibm-of-longstanding-and-pervasive-age-discrimination/>

[Back to Top](#)

Lenovo / Huawei

- **Lenovo aims for expansion in Middle East's data centre industry**
 - <https://www.thenational.ae/business/technology/lenovo-aims-for-expansion-in-middle-east-s-data-centre-industry-1.807753>
- **Oops. Huawei beaten by cheap 'n' cheerful competitors in all-flash benchmark**

- https://www.theregister.co.uk/2019/01/03/huawei_allflash_midrange_spc1_benchmark/
- **Huawei CEO defiant on security claims, vows to be so good, 'no market can keep us away'**
 - https://www.theregister.co.uk/2019/01/03/huawei_ceo_letter/
 - Huawei founder stresses trustworthiness as top priority in letter to employees
<https://www.scmp.com/tech/big-tech/article/2180479/huawei-founder-stresses-trustworthiness-top-priority-letter-employees>
 - A market without Huawei is 'like an NBA game without star players', chairman says
<https://www.thenational.ae/business/technology/a-market-without-huawei-is-like-an-nba-game-without-star-players-chairman-says-1.808765>
- **Trump considers executive order to ban Huawei and ZTE**
 - <https://www.itpro.co.uk/mobile/32645/trump-considers-executive-order-to-ban-huawei-and-zte>
 - Trump Considers New Attack on Huawei, ZTE
<https://www.sdxcentral.com/articles/news/trump-considers-new-attack-on-huawei-zte/2018/12/>
 - Berlin's dilemma: My way or the Huawei?
<https://www.dw.com/en/berlins-dilemma-my-way-or-the-huawei/a-46925935>
- **Huawei expects 2018 revenues to expand by 21% year-on-year**
 - <https://www.rcrwireless.com/20190103/5g/huawei-expects-2018-revenues-expand-21-year-on-year>
- **2018 Is a Year Huawei Would Like to Forget**
 - <https://www.sdxcentral.com/articles/news/2018-is-a-year-huawei-would-like-to-forget/2018/12/>
- **Huawei does a better job than Lenovo on R&D input and talent incentives: Top Scientist**
 - <http://www.globaltimes.cn/content/1133245.shtml>
- **Huawei releases an AI fabric white paper**
 - <https://www.telecomasia.net/content/huawei-releases-ai-fabric-white-paper>
- **China says Canadians detained after Huawei arrest 'without a doubt' violated the law**
 - <https://www.channelnewsasia.com/news/asia/china-canadian-ex-diplomat-detained-broke-law-huawei-cfo-arrest-11083028>

[Back to Top](#)

Pure / NetApp / Nutanix

- **Pure Storage looks to Asia Pacific for 2019 growth**
 - <https://digitimes.com/news/a20181228PD202.html>
- **For a storage vendor the cloud is an antithesis: NetApp's Anil Valluri**
 - https://www.business-standard.com/article/companies/for-a-storage-vendor-the-cloud-is-an-antithesis-netapp-s-anil-valluri-118122300427_1.html
- **NetApp Turns To Hotwire To Help Reposition Brand In North America**
 - <https://www.holmesreport.com/latest/article/netapp-turns-to-hotwire-to-help-reposition-brand-in-north-america>
- **Brighton and Hove gets ready for Orbis migration**
 - <https://www.computerweekly.com/news/252455159/Brighton-and-Hove-gets-ready-for-Orbis-migration>
- **Journalist jumps ship to Nutanix**
 - <https://blocksandfiles.com/2019/01/03/new-year-new-jobs/>

[Back to Top](#)

Other

- **Secoo Signed a Strategic Partnership with Oracle to Provide Continuous and Better Lifestyle Service**
 - <https://www.prnewswire.com/news-releases/secoo-signed-a-strategic-partnership-with-oracle-to-provide-continuous-and-better-lifestyle-service-300771712.html>
- **Key new features coming in Oracle Database 19c**
 - <https://searchoracle.techtarget.com/feature/Key-new-features-coming-in-Oracle-Database-19c>
- **Why Amazon Should Issue a Tracking Stock for Its Cloud Division**
 - <https://www.thestreet.com/investing/amazon-should-issue-tracking-stock-for-aws-14822389>
- **Microsoft to Buy Mellanox?**

- <https://www.hpcwire.com/2018/12/20/microsoft-to-buy-mellanox/>
- **AT&T Closes \$1.1B Sale Of Data Center Business As New Colocation Provider Emerges**
 - <https://www.crn.com/news/networking/at-t-closes-1-1b-sale-of-data-center-business-as-new-colocation-provider-emerges>
- **Cloudera And Hortonworks Complete Their Merger, Creating Big Data Platform Powerhouse**
 - <https://www.crn.com/news/applications-os/cloudera-and-hortonworks-complete-their-merger-creating-big-data-platform-powerhouse>
 - Merger with Hortonworks Complete, Cloudera Looks to Future
<https://www.datanami.com/2019/01/03/merger-with-hortonworks-complete-cloudera-looks-to-future/>
- **Back-from-the-dead array shipper Tintri teases new gear**
 - https://www.theregister.co.uk/2019/01/03/tintri_new_products/
- **5G Competition Is Finally Here (Sort of)**
 - https://www.sdxcentral.com/articles/editorial/5g-competition-is-finally-here-sort-of/2018/12/?c_action=home_news
- **Networking Vendors Jump On 400GbE in 2018**
 - <https://www.sdxcentral.com/articles/news/networking-vendors-jump-on-400gbe-in-2018/2018/12/>
- **2018 M&A in storage centered on flash, cloud and backup**
 - <https://searchstorage.techtarget.com/news/252455185/2018-MA-in-storage-centered-on-flash-cloud-and-backup>
- **Open source technology trends 2019**
 - <https://www.computerworlduk.com/open-source/open-source-predictions-for-2019-3689643/>
- **Hybrid cloud technologies become table stakes in IaaS market**
 - <https://searchcloudcomputing.techtarget.com/tip/Hybrid-cloud-technologies-become-table-stakes-in-IaaS-market>
- **8 Best Cloud Storage & File Sharing Services for Business**
 - <https://www.enterprisestorageforum.com/products/best-cloud-backup-for-business.html>
- **Top 10 cloud storage stories of 2018**
 - <https://www.computerweekly.com/feature/Top-10-cloud-storage-stories-of-2018>
- **Server sales take a hit in India as focus shifts to cloud**
 - <https://tech.economictimes.indiatimes.com/news/corporate/server-sales-take-a-hit-in-india-as-focus-shifts-to-cloud/67330823>
- **Buy server hardware with these key functions in mind**
 - <https://searchdatacenter.techtarget.com/feature/Buy-server-hardware-with-these-key-functions-in-mind>
- **HCI, acquisitions led 2018 data center news**
 - <https://searchdatacenter.techtarget.com/feature/HCI-acquisitions-led-2018-data-center-news>
- **How Agencies Can Gain Flexibility from Composable Infrastructure**
 - <https://statetechmagazine.com/article/2018/12/how-agencies-can-gain-flexibility-composable-infrastructure>
- **The solid state of storage in 2018: Latencies, they are dwindling. On-premises, the kit is glistening...**
 - https://www.theregister.co.uk/2018/12/24/the_state_of_storage_in_2018/
- **See how file system structure can drag down NVMe performance**
 - <https://searchstorage.techtarget.com/tip/See-how-file-system-structure-can-drag-down-NVMe-performance>
- **Your occasional storage digest featuring Exagrid, WANdisco and WekaIO**
 - <https://blocksandfiles.com/2019/01/04/speed-pays-for-two-storage-suppliers/>
- **Earnings announcements:**
 - IBM Q4 '18: January 22
- **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)

[Back to Top](#)