

HPE Competitive News Summary – January 3, 2020

Cisco

Dell EMC

IBM

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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

- **Cisco 2020: Challenges, prospects shape the new year**
 - <https://searchnetworking.techtarget.com/news/252476076/Cisco-2020-Challenges-prospects-shape-the-new-year>
 - Cisco Stock Had a Troubling Year. That Could Continue in 2020.
<https://www.barrons.com/articles/cisco-stock-trembled-in-2019-can-it-avoid-a-long-term-downshift-51577453400>
- **Cisco's 2019 was Flush With 5G, Security, and SD-WAN**
 - <https://www.sdxcentral.com/articles/news/ciscos-2019-was-flush-with-5g-security-and-sd-wan/2019/12/>
- **Cisco's Big 'Silicon One' Bet**
 - <https://www.lightreading.com/cloud/ciscos-big-silicon-one-bet/a/d-id/756473>
- **Apps push Cisco's data centre business forward**
 - <https://economictimes.indiatimes.com/tech/ites/apps-push-ciscos-data-centre-business-forward/articleshow/73053837.cms>
- **Cisco's Rebound May Only Be Starting**
 - <https://seekingalpha.com/article/4314945-ciscos-rebound-may-only-be-starting>
- **Cisco critical bugs: Nexus data center switch software needs patching now**
 - <https://www.zdnet.com/article/cisco-critical-bugs-nexus-data-center-switch-software-needs-patching-now/>
- **Cisco leads router market with 63.1% share, followed by Nokia and Juniper**
 - <https://techobserver.in/2019/12/25/cisco-leads-router-market-with-63-1-share-followed-by-nokia-and-juniper/>

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Dell EMC / VMware / Pivotal

- **The 10 Biggest Dell Technologies News Stories In 2019**
 - <https://www.crn.com/slide-shows/data-center/the-10-biggest-dell-technologies-news-stories-in-2019>
- **India External Storage Market Up 8% In Q3, Dell Technologies Leads**
 - <https://www.expresscomputer.in/storage/india-external-storage-market-up-8-in-q3-dell-technologies-leads/44623/>
- **Silver Lake Owns 29 Percent Stake In Dell Technologies**
 - <https://www.crn.com/news/data-center/silver-lake-owns-29-percent-stake-in-dell-technologies>
- **The Big Interview: Dell EMC's Cook on being the only woman in the room and a STEM pioneer**
 - <https://www.channelweb.co.uk/news/4008622/big-interview-dell-emc-cook-woman-stem-pioneer>
- **Dell puts RSA on the block**
 - <https://blocksandfiles.com/2020/01/03/dell-rsa-security-morgan-stanley/>
 - Dell Hires Morgan Stanley to Sell RSA Security
<https://www.channele2e.com/technology/security/dell-hires-morgan-stanley-to-sell-rsa/>
- **VMware Completes \$2.7 Billion Pivotal Software Acquisition**
 - <https://www.crn.com/news/virtualization/vmware-completes-2-7-billion-pivotal-software-acquisition>
 - 5 Things You Need To Know About VMware's Acquisition Of Pivotal
<https://www.crn.com/slide-shows/virtualization/5-things-you-need-to-know-about-vmware-s-acquisition-of-pivotal>
 - VMware Closes \$2.7 Billion Acquisition Of Pivotal Software

- <https://www.forbes.com/sites/ilkerkoksas/2020/01/02/vmware-closes-27-billion-acquisition-of-pivotal-software/#249c5f80e6ae>
 - VMware completes Pivotal acquisition
<https://www.zdnet.com/article/vmware-completes-pivotal-acquisition/>
 - VMware closes \$2.7B Pivotal deal as it sets course for a Kubernetes-powered future
<https://siliconangle.com/2019/12/30/vmware-closes-2-7b-pivotal-deal-sets-course-kubernetes-powered-future/>
 - VMware completes \$2.7 billion Pivotal acquisition
<https://techcrunch.com/2019/12/30/vmware-completes-2-7-billion-pivotal-acquisition/>
 - VMware completes Pivotal acquisition deal
<https://www.techradar.com/news/vmware-completes-pivotal-acquisition-deal>
 - VMware Acquires Pivotal
https://www.storagereview.com/vmware_acquires_pivotal
 - VMware Closes Pivotal Deal Central to Its New Kubernetes Strategy
<https://www.datacenterknowledge.com/vmware/vmware-closes-pivotal-deal-central-its-new-kubernetes-strategy>
 - VMware finalises billion-dollar Pivotal acquisition
<https://www.itproportal.com/news/vmware-finalises-billion-dollar-pivotal-acquisition/>
 - VMware sticks a fork in its \$2.7B deal to buy Pivotal
<https://www.fiercetelecom.com/telecom/vmware-sticks-a-fork-its-2-7b-deal-to-buy-pivotal>
 - VMware Folds Pivotal Into New Modern App Biz Unit
<https://www.sdxcentral.com/articles/news/vmware-folds-pivotal-into-new-modern-app-biz-unit/2019/12/>
 - VMware Signs Definitive Agreement to Acquire Pivotal Software
<https://ir.vmware.com/overview/press-releases/press-release-details/2019/VMware-Signs-Definitive-Agreement-to-Acquire-Pivotal-Software/default.aspx>
- **VMware's Chris Wolf predicts edge solutions will come to life in 2020**
 - <https://www.fiercetelecom.com/telecom/vmware-s-wolf-predicts-edge-solutions-will-come-to-life-2020>
- **VMware to use MinIO object storage in Kubernetes embrace**
 - <https://blocksandfiles.com/2019/12/23/vmware-minio-object-storage-kubernetes/>
 - VMware Widens Its Kubernetes Embrace
<https://www.datanami.com/2020/01/02/vmware-widens-its-kubernetes-embrace/>
 - VMware Sets Kubernetes Strategy for 2020
<https://containerjournal.com/topics/container-ecosystems/vmware-sets-kubernetes-strategy-for-2020/>

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IBM

- **IBM Bet Everything on an Acquisition in 2019. Now It Needs to Grow Again.**
 - <https://www.barrons.com/articles/ibm-bet-everything-on-red-hat-in-2019-51577479288>
 - IBM's tech trends to watch in 2020 and beyond
<https://it-online.co.za/2020/01/02/ibms-tech-trends-to-watch-in-2020-and-beyond/>
- **IBM hears voice of mid-market as telcos pause**
 - <https://gizmoposts24.com/technology/ibm-hears-voice-of-mid-market-as-telcos-pause-2-47573/>
- **IBM: How cloud computing is changing the developer world**
 - <https://appdeveloperomagazine.com/how-cloud-computing-is-changing-the-developer-world/>
- **AI in business exploding, IBM says**
 - <https://www.foxbusiness.com/technology/ai-in-business-exploding-ibm-says>
- **How To Lose A Monopoly: Microsoft, IBM And Anti-Trust**
 - <https://seekingalpha.com/article/4314831-how-to-lose-monopoly-microsoft-ibm-and-anti-trust>
- **Going forward, partners like IBM will 'keep the lights on': IBM India General Manager**
 - <https://economictimes.indiatimes.com/articleshow/73043192.cms>

- **IBM unveils cobalt-free battery tech**

- <https://www.energylive.news.com/2020/01/02/ibm-unveils-cobalt-free-battery-tech/>
- The 5 biggest battery innovations of 2019
<https://www.techrepublic.com/article/the-5-biggest-battery-innovations-of-2019/>
- No more heavy metals? New IBM battery chemistry research could address mineral sourcing concerns
<https://www.greenbiz.com/article/no-more-heavy-metals-new-ibm-battery-chemistry-research-could-address-mineral-sourcing>

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Lenovo / Huawei

- **Lenovo's vice president Chang Cheng announces he is leaving the tech giant**

- <https://www.gizmochina.com/2019/12/31/lenovos-vice-president-chang-cheng-announces-he-is-leaving-the-tech-giant/>
- Former Lenovo VP Chang Cheng may face some legal issues after joining Xiaomi
<https://www.gizmochina.com/2020/01/02/former-lenovo-vp-chang-cheng-could-face-legal-actions-after-joining-xiaomi/>

- **SA still has a lot to give, says Lenovo**

- <https://www.itweb.co.za/content/nWJadvb8DldMbJO1>

- **Huawei Battles Reign in 2019**

- <https://www.sdxcentral.com/articles/news/huawei-battles-reign-in-2019/2019/12/>
- Huawei's sales grew in 2019, but it says next year will be 'difficult'
<https://www.cnn.com/2019/12/30/tech/huawei-revenue-smartphone-sales/index.html>

- **Huawei warns of 'difficult' year ahead amidst ongoing trade ban**

- <https://www.zdnet.com/article/huawei-warns-of-difficult-year-ahead-amidst-ongoing-trade-ban/>
- Huawei's revenue hits record \$122B this year despite US sanctions, forecasts 'difficult' 2020
<https://techcrunch.com/2019/12/30/huaweis-revenue-hits-record-122b-this-year-despite-u-s-sanctions-forecasts-difficult-2020/>
- Huawei feels 'bite of winter' after Trump ban
<https://www.bbc.com/news/business-50947091>
- Huawei Posts Solid Growth but Warns of Difficulties Ahead
<https://www.nytimes.com/2019/12/30/business/huawei-revenue-growth.html>
- Huawei's 2019 revenue to jump 18%, forecasts 'difficult' 2020
<https://www.reuters.com/article/us-huawei-tech-results/huaweis-2019-revenue-to-jump-18-forecasts-difficult-2020-idUSKBN1YY1JL>
- Huawei Warns 2020 Will Be Difficult: 'Survival Will Be Our First Priority'
<https://www.forbes.com/sites/zakdoffman/2020/12/30/huawei-warns-2020-will-be-difficult-survival-will-be-our-first-priority/#61553f868e67>
- Huawei reports strong year despite export ban
<https://www.columbian.com/news/2020/jan/02/huawei-reports-strong-year-despite-export-ban/>
- Huawei sees 'difficult year' ahead amid US trade ban
<https://www.techinasia.com/huawei-sees-difficult-year-trade-ban>
- Huawei's new year resolution? 'Survival'
<https://metro.co.uk/2020/01/02/huaweis-new-year-resolution-survival-11989742/>
- Huawei's 4 big issues in 2020 — from the blacklist to the decision over its operating system's future
<https://www.cnn.com/2019/12/31/huawei-2020-outlook-us-blacklist-harmonyos-cfo-trial.html>
- Huawei ban: Full timeline as Chinese company's chairman predicts 'difficult' 2020
<https://www.cnet.com/news/huawei-ban-full-timeline-2020-us-government-china-trump-ban-security-threat-mate-x/>
- Huawei sales up 18% but US pressure means tough times ahead
<https://www.wraltechwire.com/2019/12/31/huawei-sales-up-18-but-us-pressure-means-tough-times-ahead/>
- Huawei Braces for 'Difficult' 2020 After Q4 Slowdown
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- Huawei expects 2019 revenues to grow by 18% y-o-y despite US pressure
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- **Huawei Vows to Shake Up Ranks as Trump's Curbs Bite in 2020**
 - <https://www.bloomberg.com/news/articles/2019-12-30/huawei-to-shake-up-exec-ranks-in-2020-as-trump-curbs-bite-deeper>
 - Huawei says underperforming managers to face ax in 2020
<https://asia.nikkei.com/Spotlight/Huawei-crackdown/Huawei-says-underperforming-managers-to-face-ax-in-2020>
 - Huawei to get tough on underperforming staff
<https://www.mobileworldlive.com/featured-content/home-banner/huawei-to-get-tough-on-underperforming-staff/>
- **HiSilicon is no longer supplying chips just to Huawei**
 - <https://www.androidcentral.com/hisilicon-moves-past-just-supplying-chips-huawei>

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Pure / NetApp / Nutanix

- **NetApp tops IDC's inaugural scale-out file storage Marketscape**
 - <https://blocksandfiles.com/2019/12/24/netapp-top-idc-scale-out-file-storage-marketscape/>
- **NetApp ONTAP 9.7 Review**
 - https://www.storagereview.com/netapp_ontap_97_review
- **Why Is Nutanix Down 3.6% Since Last Earnings Report?**
 - <https://finance.yahoo.com/news/why-nutanix-ntnx-down-3-163004288.html>
- **Nutanix Continues Senior Hiring Splurge With Big EMEA Accounts Head**
 - <https://data-economy.com/nutanix-continues-senior-hiring-splurge-with-big-emea-accounts-head/>

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Other

- **After Two Years, JEDI is Finally Underway**
 - <https://www.nextgov.com/it-modernization/2019/12/after-two-years-jedi-finally-underway/162005/>
 - Oracle's JEDI Appeal Continues
<https://www.nextgov.com/cio-briefing/2020/01/oracles-jedi-appeal-wages/162206/>
 - How Microsoft Won The Pentagon Contract And Why It Matters
<https://seekingalpha.com/article/4315014-how-microsoft-won-pentagon-contract-and-why-matters>
- **Oracle Deploys Cloud Region in India to Support Client Growth**
 - <https://finance.yahoo.com/news/oracle-deploys-cloud-region-india-145602796.html>
- **Microsoft, Oracle expand Cloud partnership to Canada**
 - <https://www.livemint.com/technology/tech-news/microsoft-oracle-expand-cloud-partnership-to-canada-11577258047669.html>
- **Amazon Vs. Oracle: AWS's #1 Challenge Is Larry Ellison's Autonomous Database**
 - <https://cloudwars.co/amazon-aws-2020-challenge-oracle-autonomous-database/>
- **Oracle copied Amazon's API—was that copyright infringement?**
 - <https://arstechnica.com/tech-policy/2020/01/oracle-copied-amazons-api-was-that-copyright-infringement/>
- **TCS goes Extreme with Oracle HCM Cloud**
 - <https://www.enterprisetimes.co.uk/2020/01/02/tcs-goes-extreme-with-oracle-hcm-cloud/>
 - TCS successfully completes Oracle HCM Cloud transformation for Extreme Networks
<https://www.dqindia.com/tcs-successfully-completes-oracle-hcm-cloud-transformation-extreme-networks/>
 - Oracle HCM Cloud to Boost Extreme Networks HR Capabilities
<https://www.zacks.com/stock/news/700499/oracle-hcm-cloud-to-boost-extreme-networks-hr-capabilities>
- **SAP and Oracle Versus The Best of Breeds**

- <https://www.forbes.com/sites/stevebanker/2019/12/26/sap-and-oracle-versus-the-best-of-breeds/#d79d9743aab8>
- **Amazon plots quantum leap as Alibaba makes strides in cloud**
 - <https://asia.nikkei.com/Editor-s-Picks/Interview/Amazon-plots-quantum-leap-as-Alibaba-makes-strides-in-cloud>
- **For Alibaba, Size Does Not Matter As It Looks To Tap India's Cloud Market**
 - <https://inc42.com/features/for-alibaba-size-does-not-matter-as-it-looks-to-tap-indias-cloud-market/>
- **Azure founders reflect on Microsoft's first decade as a public cloud vendor**
 - <https://www.zdnet.com/article/azure-founders-reflect-on-microsofts-first-decade-as-a-public-cloud-vendor/>
- **Intel, Google take quantum leaps, but the wait isn't over**
 - <https://www.livemint.com/technology/tech-news/intel-google-take-quantum-leaps-but-the-wait-isn-t-over-11577982129205.html>
- **Google adds new Coral chip modules for AI at the edge**
 - <https://siliconangle.com/2020/01/02/google-adds-new-coral-chip-modules-ai-edge/>
 - Google unveils Coral Dev Board Mini and Coral Accelerator Module
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- **How edge computing may revamp, revitalize commercial real estate**
 - <https://www.zdnet.com/article/how-edge-computing-may-revamp-revitalize-commercial-real-estate/>
- **Acronis and Qumulo join the storage unicorn herd**
 - <https://blocksandfiles.com/2020/01/02/coldago-storage-unicorn-list-2019/>
- **Amazon, Google, Microsoft: Who had the best year in cloud in 2019?**
 - https://www.theregister.co.uk/2020/01/02/amazon_google_microsoft_who_had_the_best_year_in_cloud_in_2019/
- **Hitachi Vantara tops IDC Object Storage Marketscape**
 - <https://blocksandfiles.com/2019/12/23/idc-2019-object-storage-marketscape/>
- **Hyperclouds Muscle in on Telco Cloud**
 - <https://www.lightreading.com/cloud/hyperclouds-muscle-in-on-telco-cloud/d/d-id/756437>
- **Kubernetes Opportunities, Challenges Escalated in 2019**
 - <https://www.sdxcentral.com/articles/news/kubernetes-opportunities-challenges-escalated-in-2019/2019/12/>
- **A Hyperconvergence Progress Report: Has Kubernetes Stolen the Show?**
 - <https://www.datacenterknowledge.com/open-source/hyperconvergence-progress-report-has-kubernetes-stolen-show>
- **D2IQ Is Ready To Ramp Channel Engagement With Its First Partner Program**
 - <https://www.crn.com/news/cloud/d2iq-is-ready-to-ramp-channel-engagement-with-its-first-partner-program>
- **Juniper SD-WAN Demo Lets Customers Try Before They Buy**
 - <https://www.sdxcentral.com/articles/news/juniper-sd-wan-demo-lets-customers-try-before-they-buy/2019/12/>
- **Juniper Hires New Channel Chief**
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 - Juniper Networks Kicks Off 2020 with New Channel Chief
<https://www.channelfutures.com/leadership/juniper-networks-kicks-off-2020-with-new-channel-chief>
 - Juniper Taps Extreme Veteran for Top Channel Role
<https://channelnomics.com/2020/01/03/juniper-taps-extreme-veteran-for-top-channel-role/>
- **Top minds in machine learning predict where AI is going in 2020**
 - <https://venturebeat.com/2020/01/02/top-minds-in-machine-learning-predict-where-ai-is-going-in-2020/>
- **SDxCentral's Top 10 Articles of 2019**
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- **Who Went Where: The Top Headcount Changes of 2019**
 - <https://www.sdxcentral.com/articles/news/who-went-where-the-top-headcount-changes-of-2019/2019/12/>
- **Data 2020 Outlook Part I: The Hybrid Default Era begins**
 - <https://www.zdnet.com/article/data-2020-outlook-part-i-the-hybrid-default-era-begins/>

- **These 10 enterprise M&A deals totaled over \$40B in 2019**
 - <https://techcrunch.com/2020/01/01/these-ten-enterprise-ma-deals-totaled-over-40b-in-2019/>
- **HPE goes on the warpath, attacks AWS over vendor lock-in**
 - https://www.theregister.co.uk/2019/12/23/hpe_go_on_the_warpath_seeks_to_scalp_aws_over_vendor_lockin/
- **Earnings announcements:**
 - IBM Q4 2019 - January 21 (preliminary)
- **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)

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