

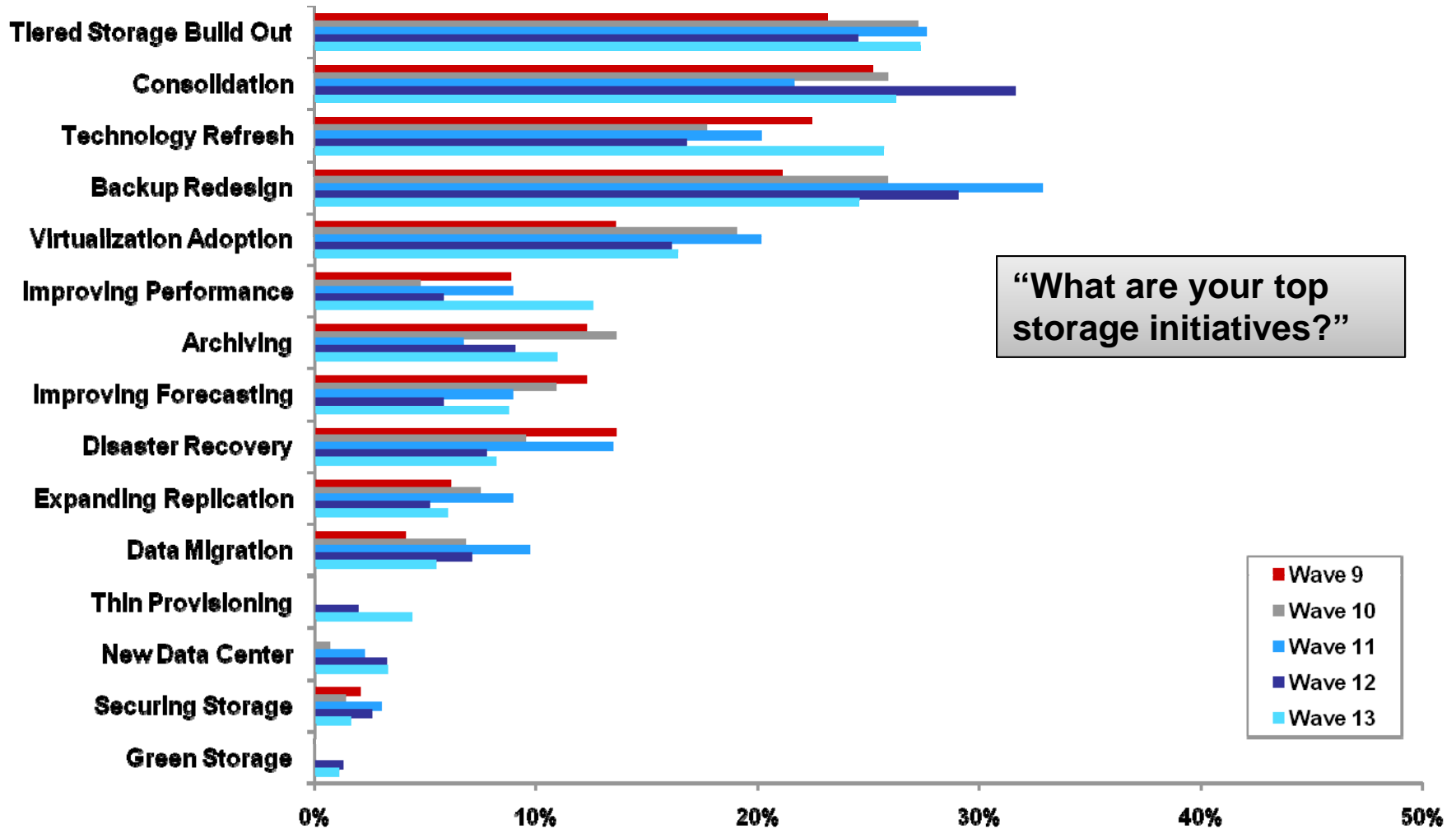
Highlights from TheInfoPro Storage Study Wave 13

January 2010

EMC dominates in the backup/data reduction/deduplication and VTL for open systems in Fortune 1000 companies and in medium/small enterprises.

Backup/data reduction/deduplication remains #1 on the technology heat index for the 5th straight year

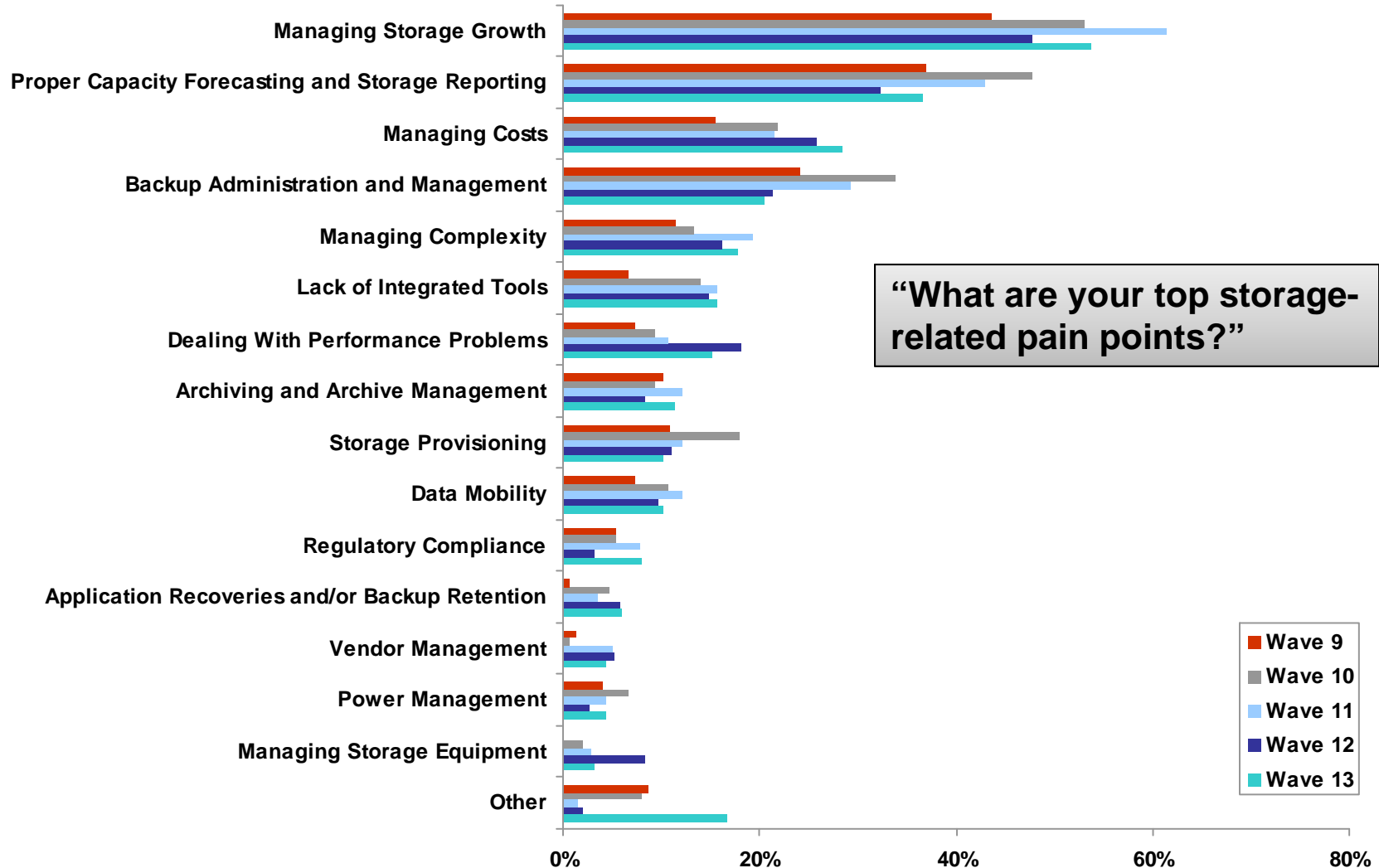
F1000 Top Storage Initiatives



“What are your top storage initiatives?”

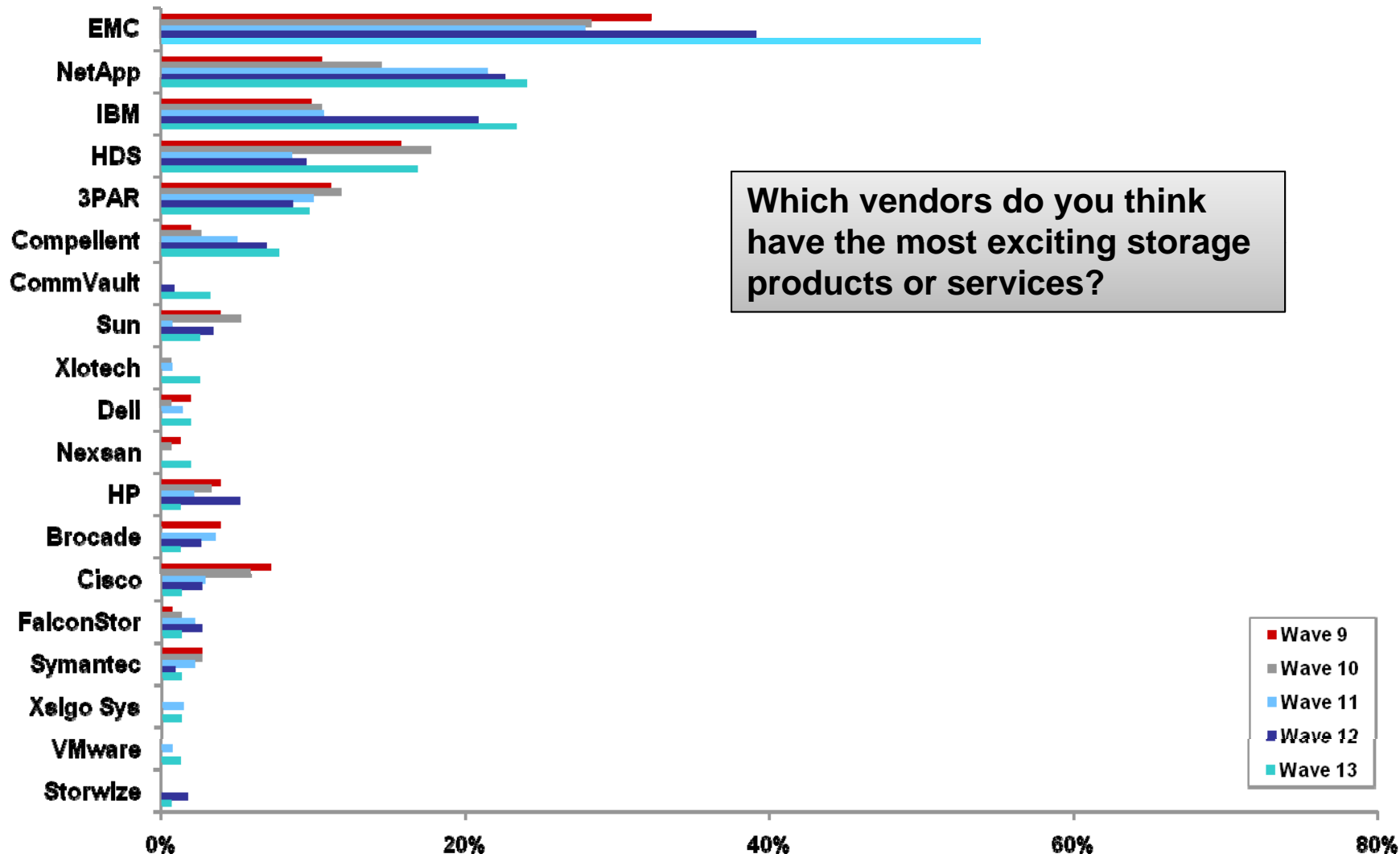
(12/2/09): F1000 Sample. Wave 9, n=147; Wave 10, n=147; Wave 11, n=134; Wave 12, n=155; Wave 13, n=183. *Note that due to multiple responses per interview, total exceeds 100%.

F1000 Storage Professionals' Pain Points



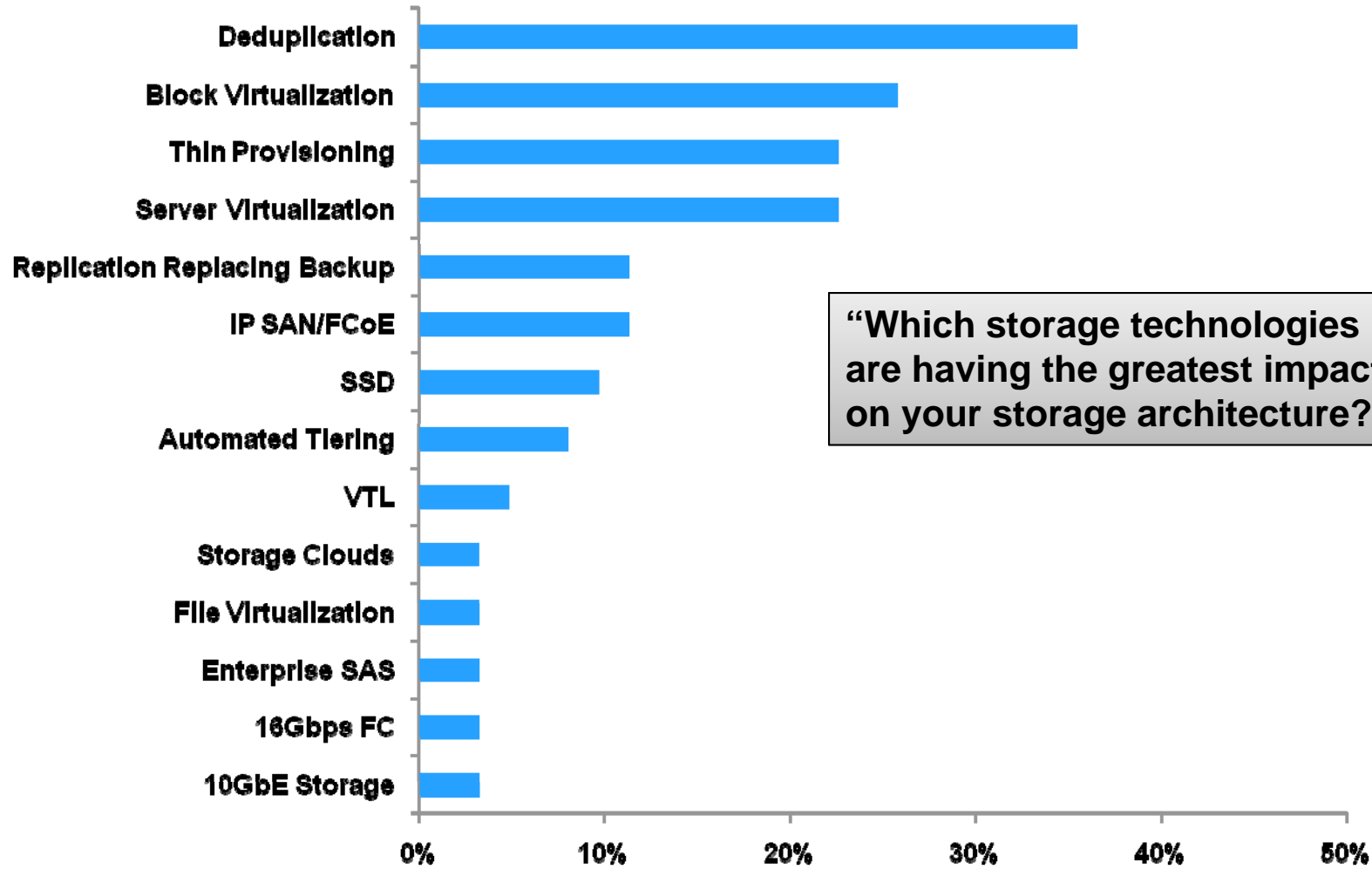
(12/2/09): F1000 Sample. Wave ,9 n=149; Wave 10, n=151; Wave 11, n=140; Wave 12, n=155; Wave 13, n=186. *Note that due to multiple responses per interview, total exceeds 100%.
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F1000: Vendors with Exciting Technologies



(12/2/09): F1000 Sample. Wave 9, n=152; Wave 10, n=152; Wave 11, n=140; Wave 12, n=115; Wave 13, n=154. *Note that due to multiple responses per interview, total exceeds 100%.
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Top Technologies Impacting Storage Architecture



(12/7/09): Full Sample. n=62.

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Storage Networking Technology Heat Index® Change



Gauges the Immediacy of User Needs and Planned Spending for Each Technology

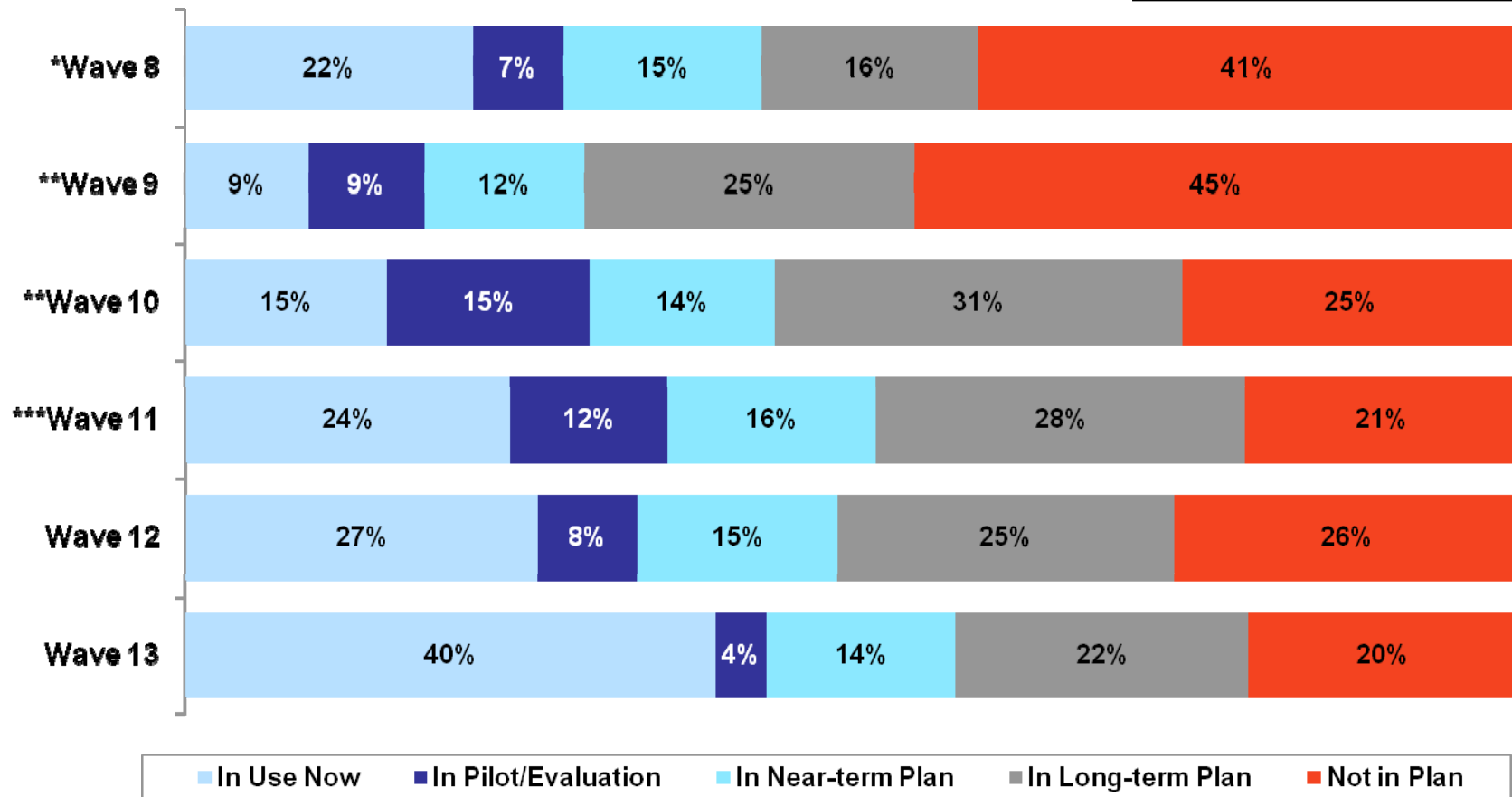
Technology	Wave 8 Rank	Wave 9 Rank	Wave 10 Rank	Wave 11 Rank	Wave 12 Rank	Wave 13 Rank
Backup Data Reduction/Deduplication	14	1	1	1	1	1
Online Data Reduction/Deduplication	N/A	N/A	N/A	N/A	2	2
Solid-state Disk Drives (SSD)	21	25	N/A	23	10	3
Virtual Tape Library (VTL) for Open Systems	2	3	2	2	3	4
8Gbps Fibre Channel	N/A	N/A	N/A	18	11	5
4Gbps Fibre Channel	1	2	3	7	4	6
Remote Block Mirroring and/or Wide-area Replication (Async)	7	14	4	9	8	7
Block Replication (Sync)	11	8	8	6	7	8
Virtual Server Image Storage	N/A	N/A	N/A	N/A	9	8
Remote File Mirroring and/or Wide-area Replication (Async)	10	17	17	14	13	10
Serial-attached SCSI Drives (SAS)	19	21	20	18	5	11
NPIV – Virtualized I/O	N/A	15	13	4	6	12
File Replication (Sync)	12	15	15	8	12	13
Fibre Channel Over Ethernet (FCoE)	N/A	N/A	22	21	16	14
Wide-area File Services (WAFS)	4	5	8	16	16	15
10Gbps Ethernet for Storage	12	19	19	17	19	16
NAS Gateways	15	19	N/A	N/A	13	17
Fixed Content and/or Content-addressed Storage (CAS) Arrays	16	12	10	10	16	18
IP SAN Storage Array	18	11	18	25	21	19
Fabric-based Intelligence	5	7	6	15	15	20
Desktop/Laptop Backup/Deduplication	N/A	N/A	N/A	N/A	22	21

(11/24/09): F1000 Sample. Wave 8, n=153; Wave 9, n=152; Wave 10, n=152; Wave 11, n=140; Wave 12, n=156; Wave 13, n=186.

Backup Data Reduction/Deduplication – Implementation



Heat Index Rank: 1
Storage Networking Wave 13

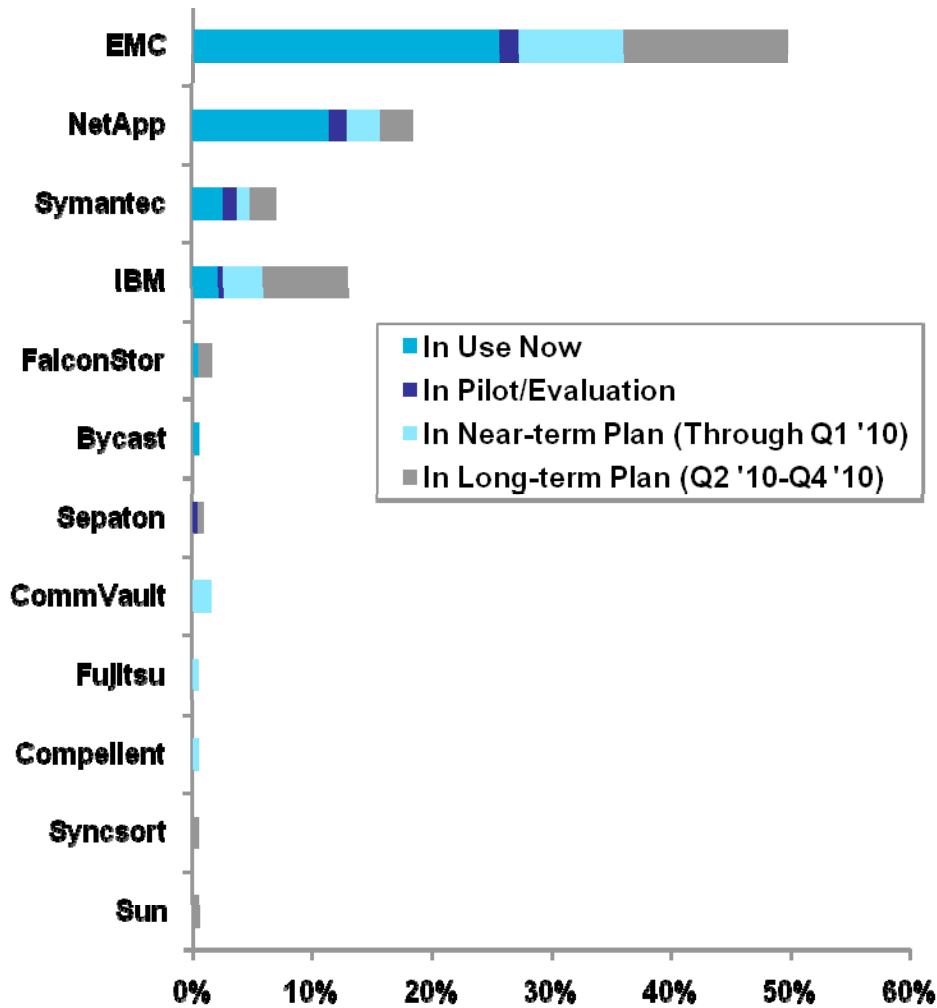


(11/18/09): F1000 Sample. Wave 8, n=148; Wave 9, n=150; Wave 10, n=151; Wave 11, n=127; Wave 12, n=147; Wave 13, n=183.

*Technology was previously categorized as Deduplication. **Technology was previously categorized as Deduplication/ Capacity Optimized Storage/Single Backup Instance Store.

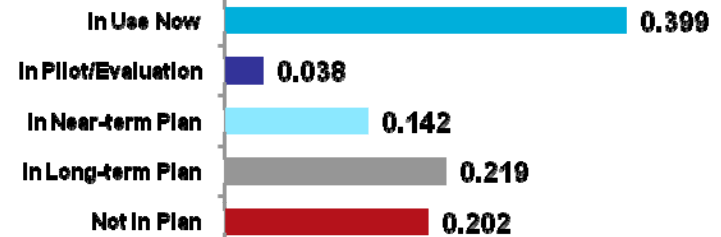
***Technology was previously categorized as Single Backup Instance Store Software.

F1000: Backup Data Reduction/Deduplication

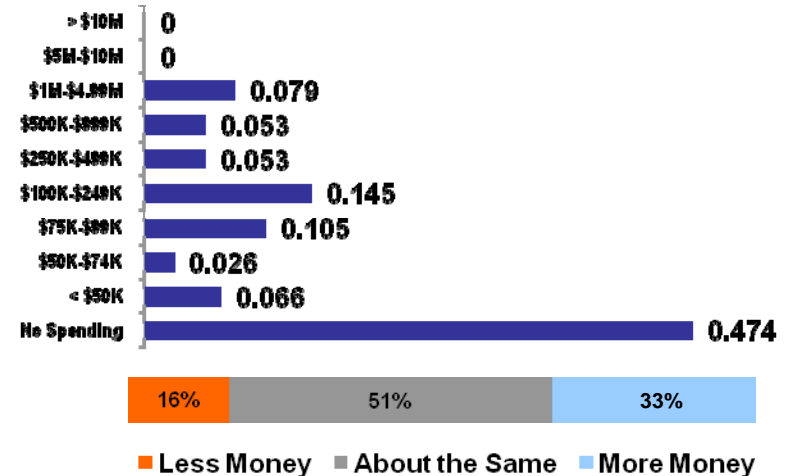


Roll-up Implementation Time Frame

Storage Networking Heat Index Rank: 1

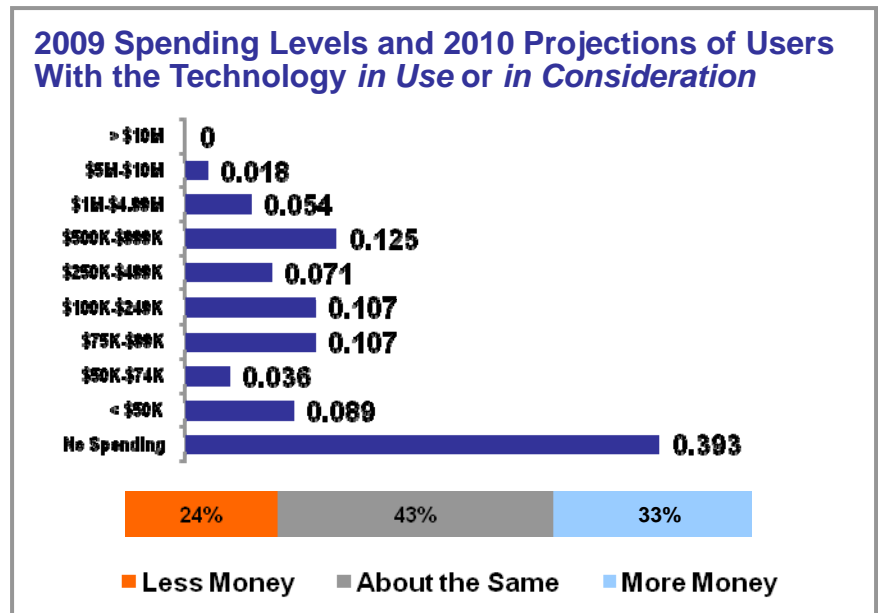
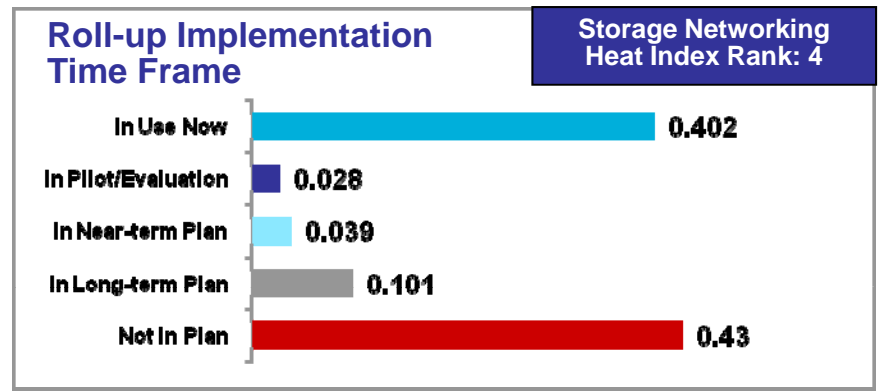
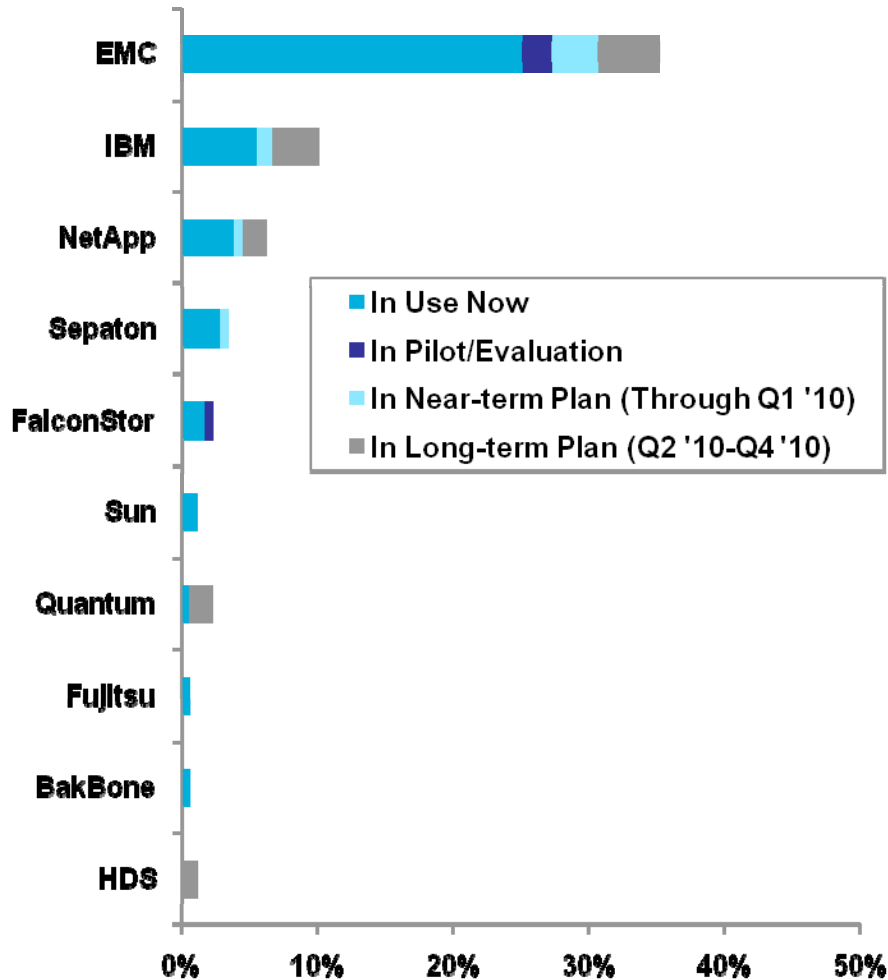


2009 Spending Levels and 2010 Projections of Users With the Technology *in Use or in Consideration*



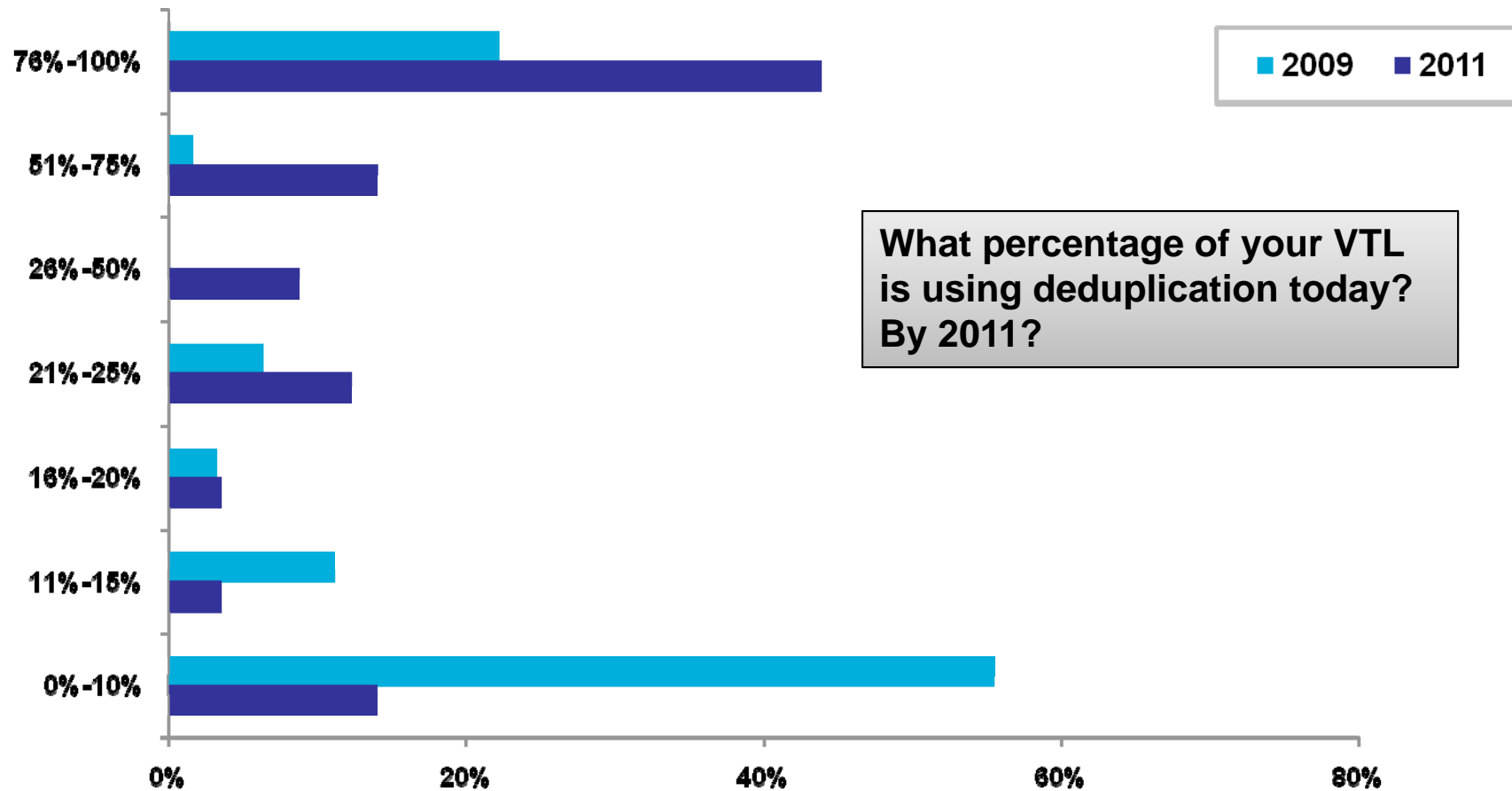
(11/12/09): F1000 Sample. Left and Top Right Charts: n=183. Lower Right Chart: n=76. Lower Bottom Right Chart: n=37.

F1000: Virtual Tape Library for Open Systems



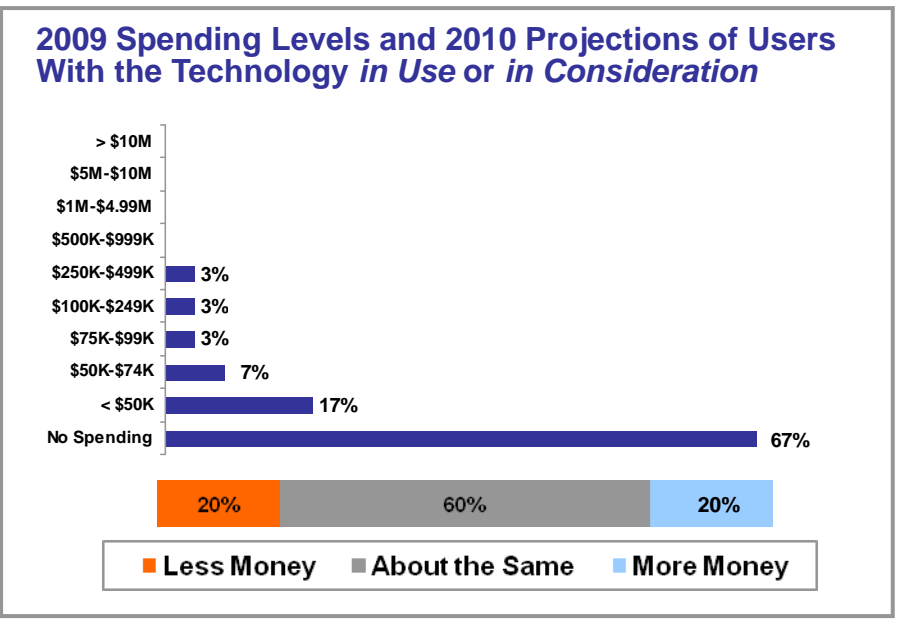
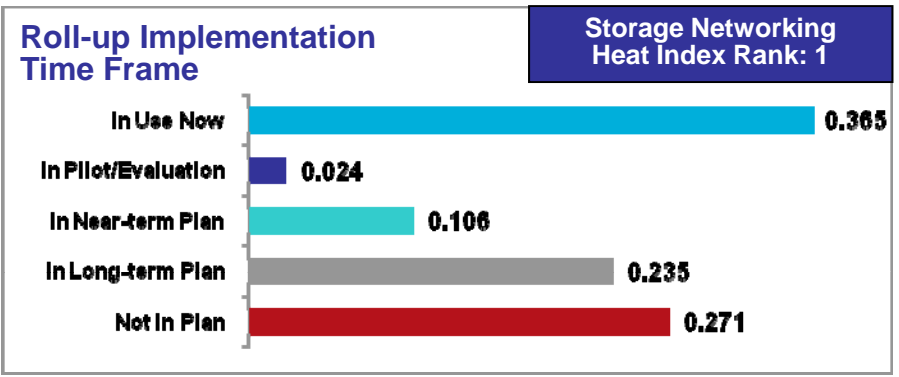
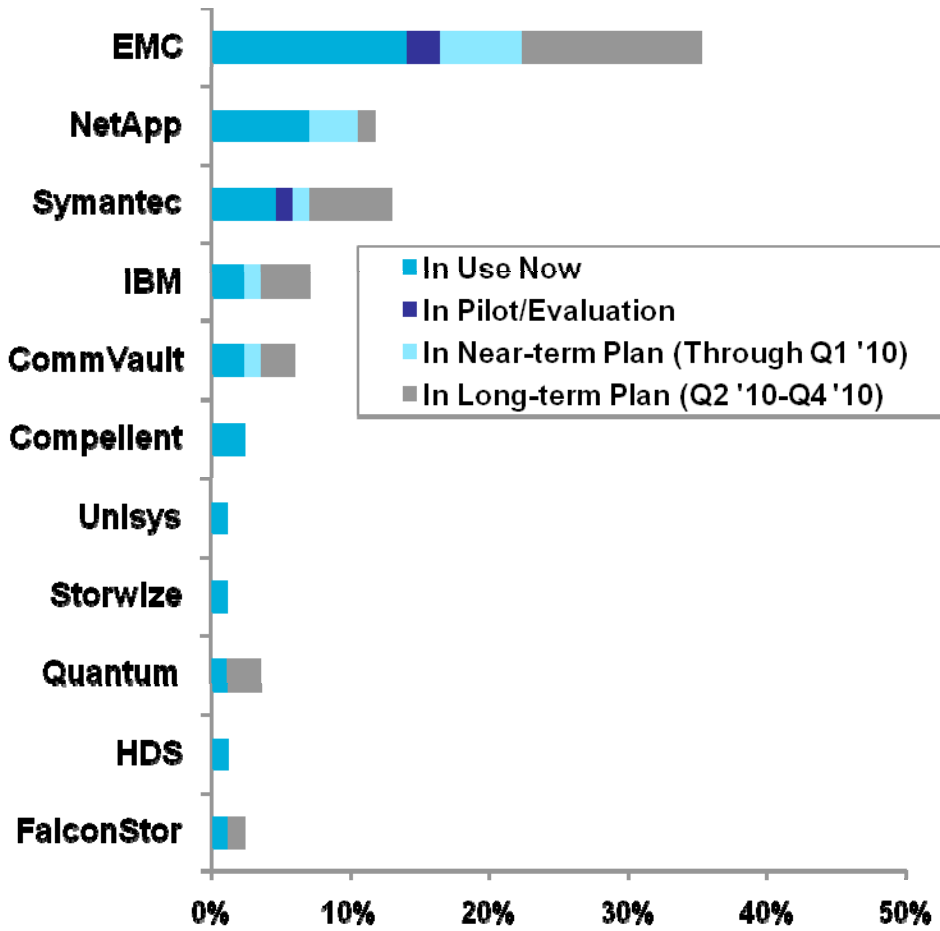
(11/12/09): F1000 Sample. Left and Top Right Charts: n=179. Lower Right Chart: n=56. Lower Bottom Right Chart: n=41.

Percentage of VTL Using Deduplication



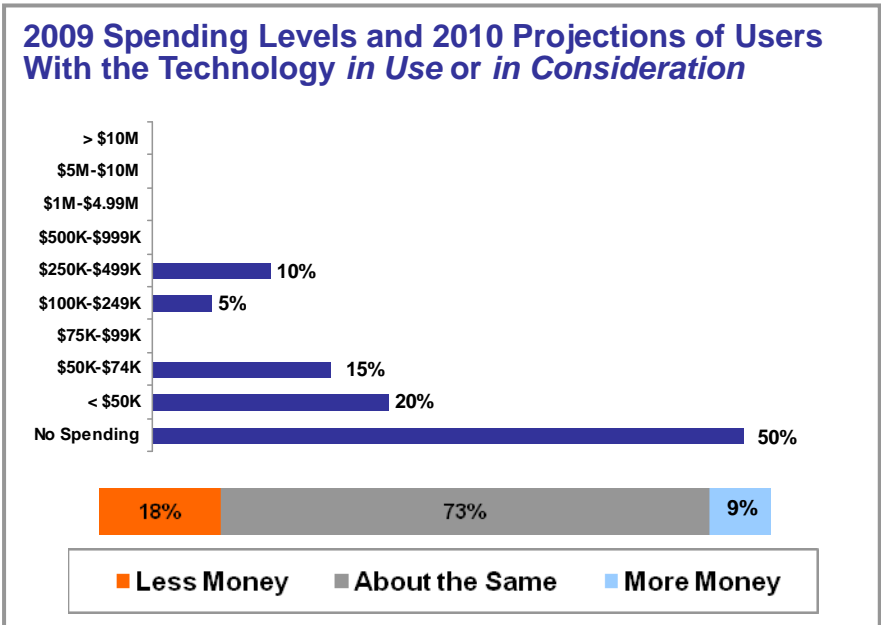
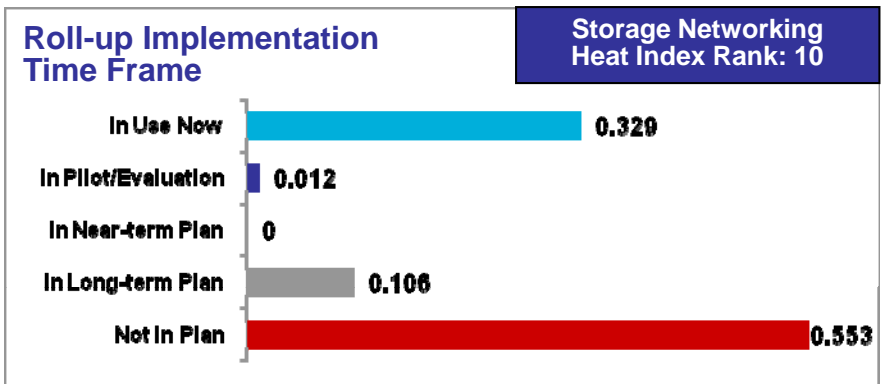
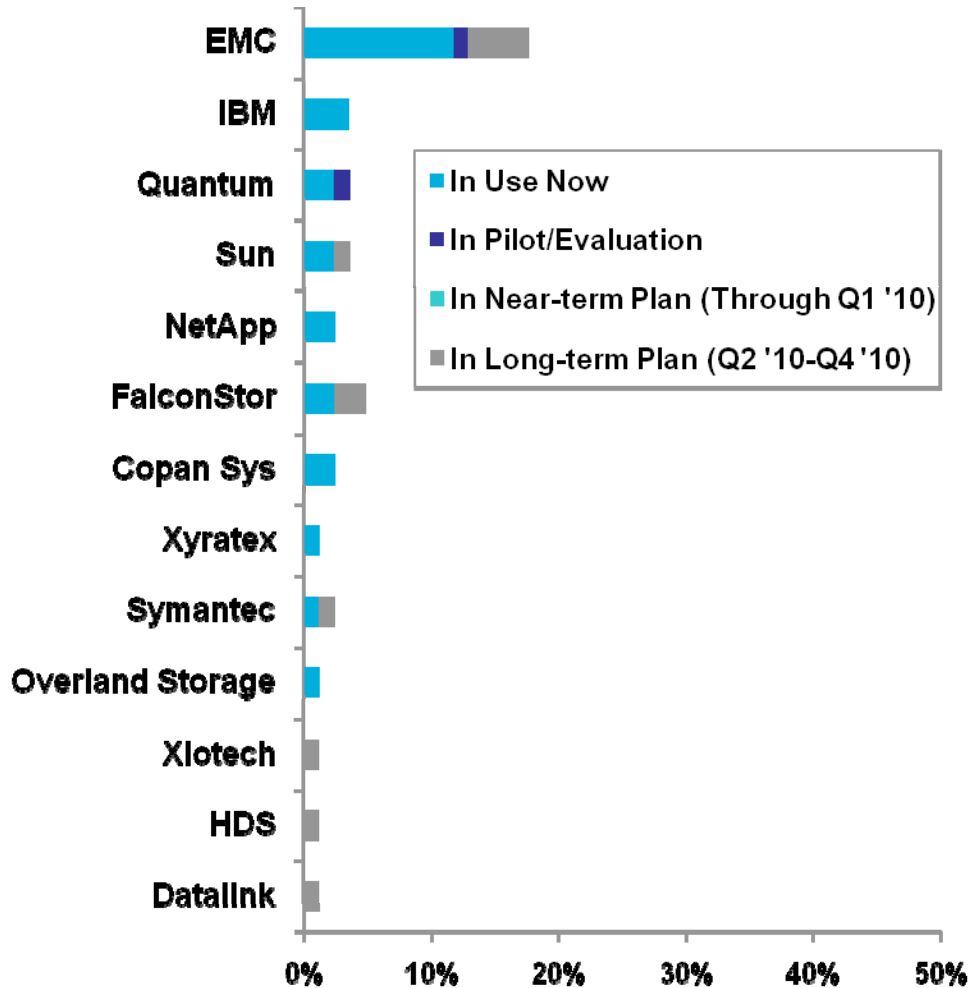
(12/8/09): Full Sample. 2009: n=63. 2011: n=57.

MSE: Backup Data Reduction/Deduplication



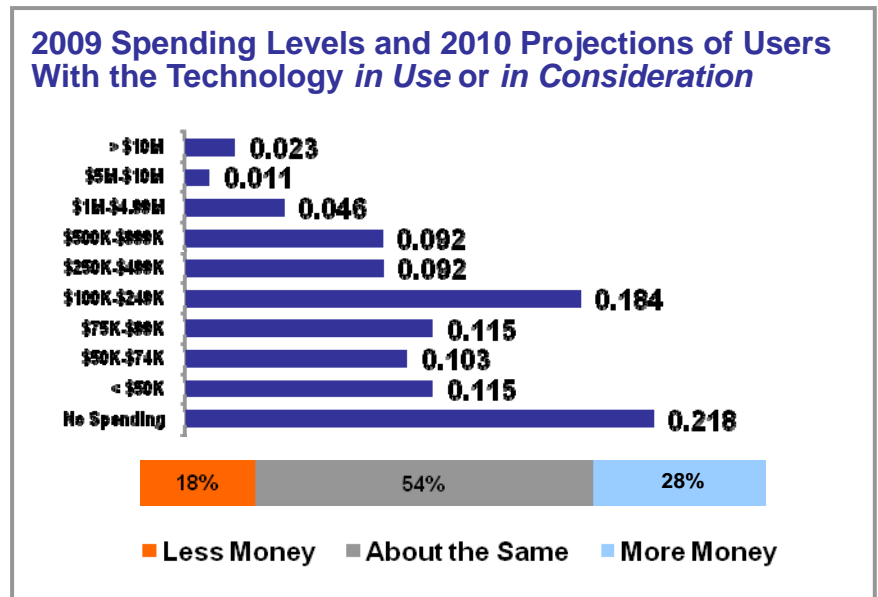
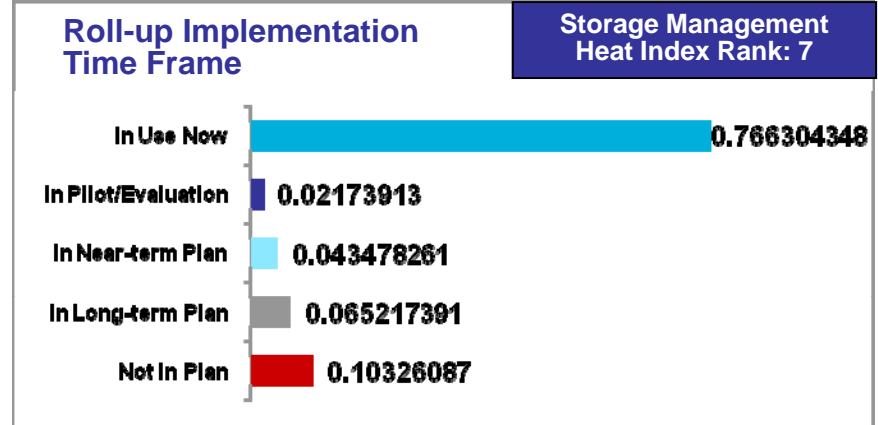
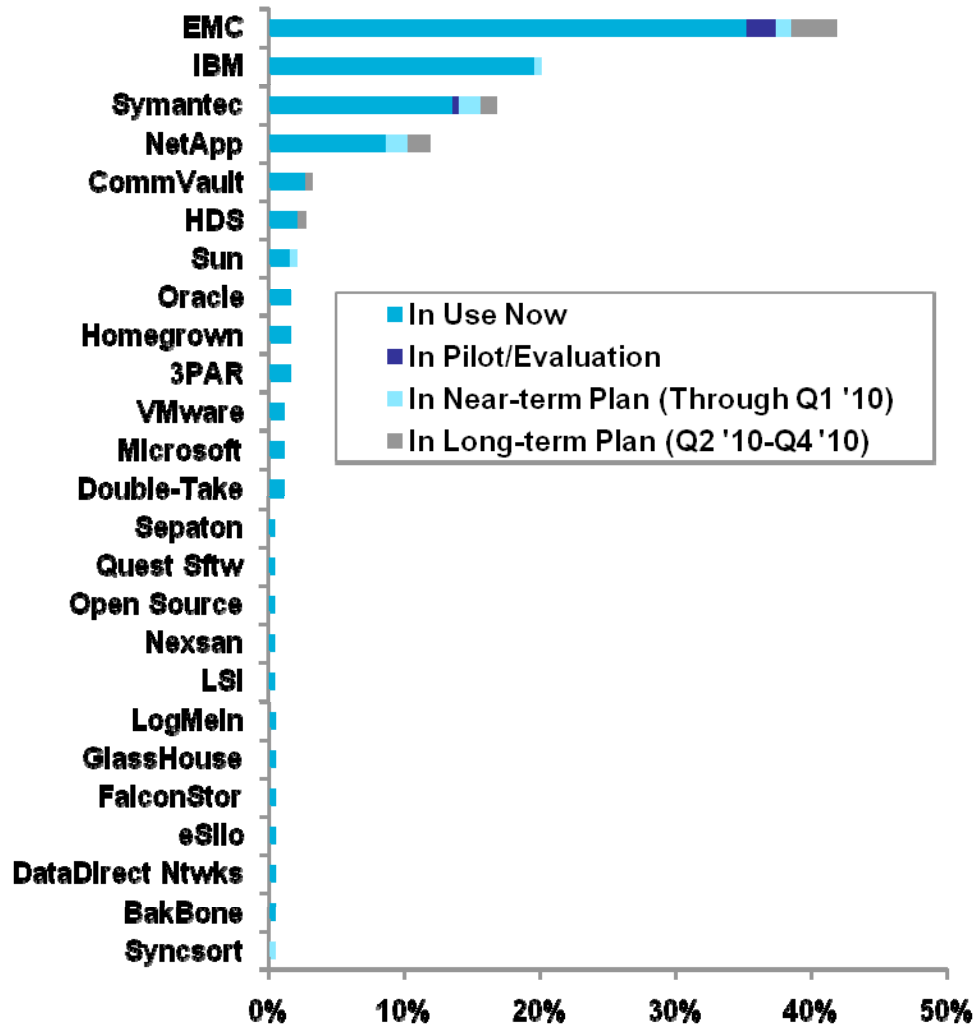
(11/16/09): MSE Sample. Left and Top Right Charts: n=85. Lower Right Chart: n=30. Lower Bottom Right Chart: n=15.

MSE: Virtual Tape Library for Open Systems



(11/16/09): MSE Sample. Left and Top Right Charts: n=85. Lower Right Chart: n=20. Lower Bottom Right Chart: n=11.

MSE: Disk-to-Disk (for Backup to Disk Targets)



(11/12/09): F1000 Sample. Left and Top Right Charts: n=184. Lower Right Chart: n=87. Lower Bottom Right Chart: n=76.
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