

August 14, 2008

4:00 p.m. Eastern/1:00 p.m. Pacific

60 Minutes



# Enterprise Web 2.0 Technologies



Where  
**Tech Buyers**  
Get **Results**

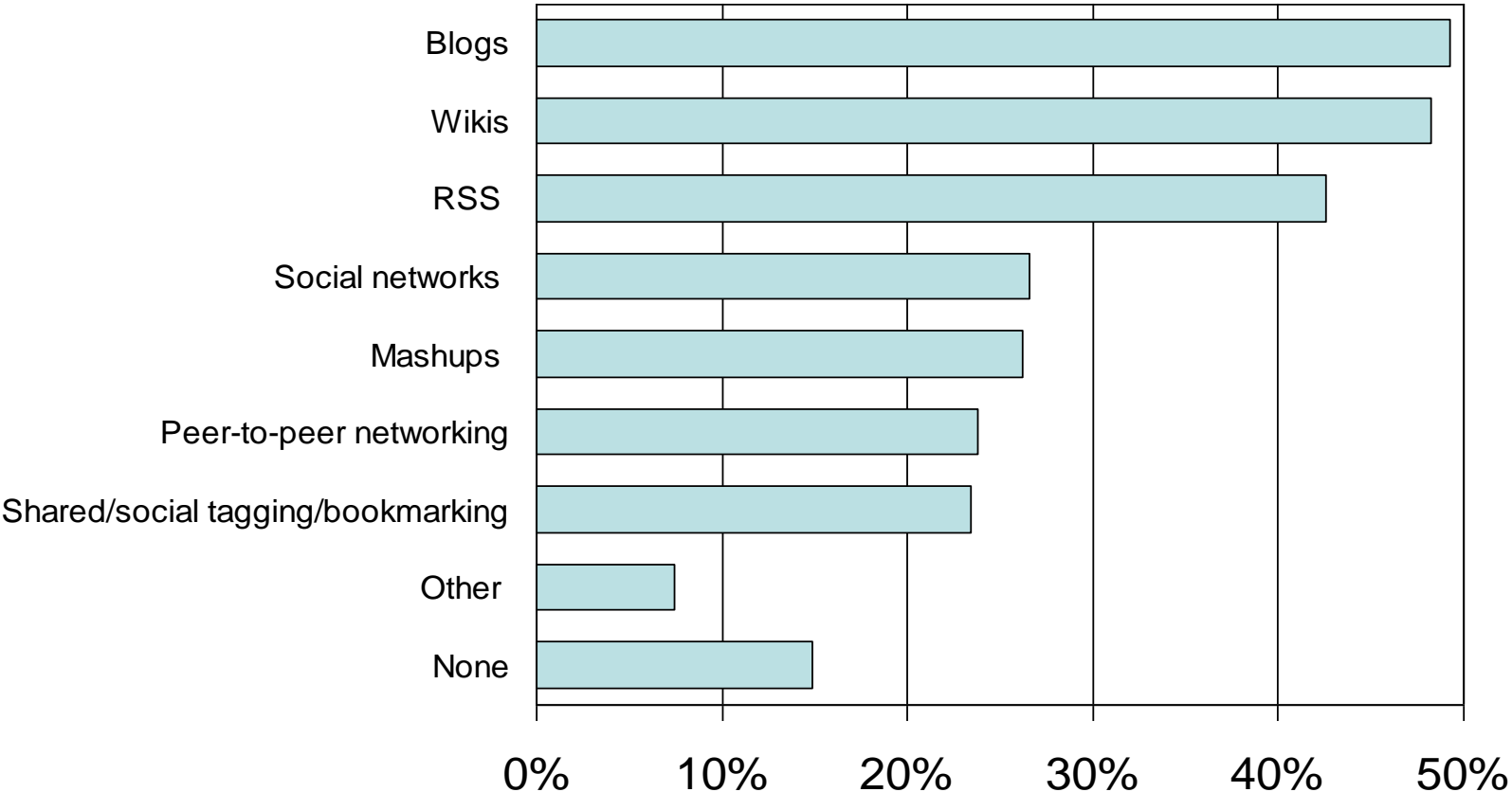
# The Rising Web 2.0 Tide



- According to a Gartner survey of 1,500 CIOs worldwide, half of the respondents said they plan to invest in Web 2.0 technologies for the first time in 2008.
- These types of applications are inordinately hungry for storage capacity.
- Massive scaling requires maximum utilization
- Different performance characteristics thanks to streaming video and audio
- Latency sensitive social media applications
- Demand is inconsistent and there is a lot of jitter
- Require redundancy
- Often require global 24X7 access



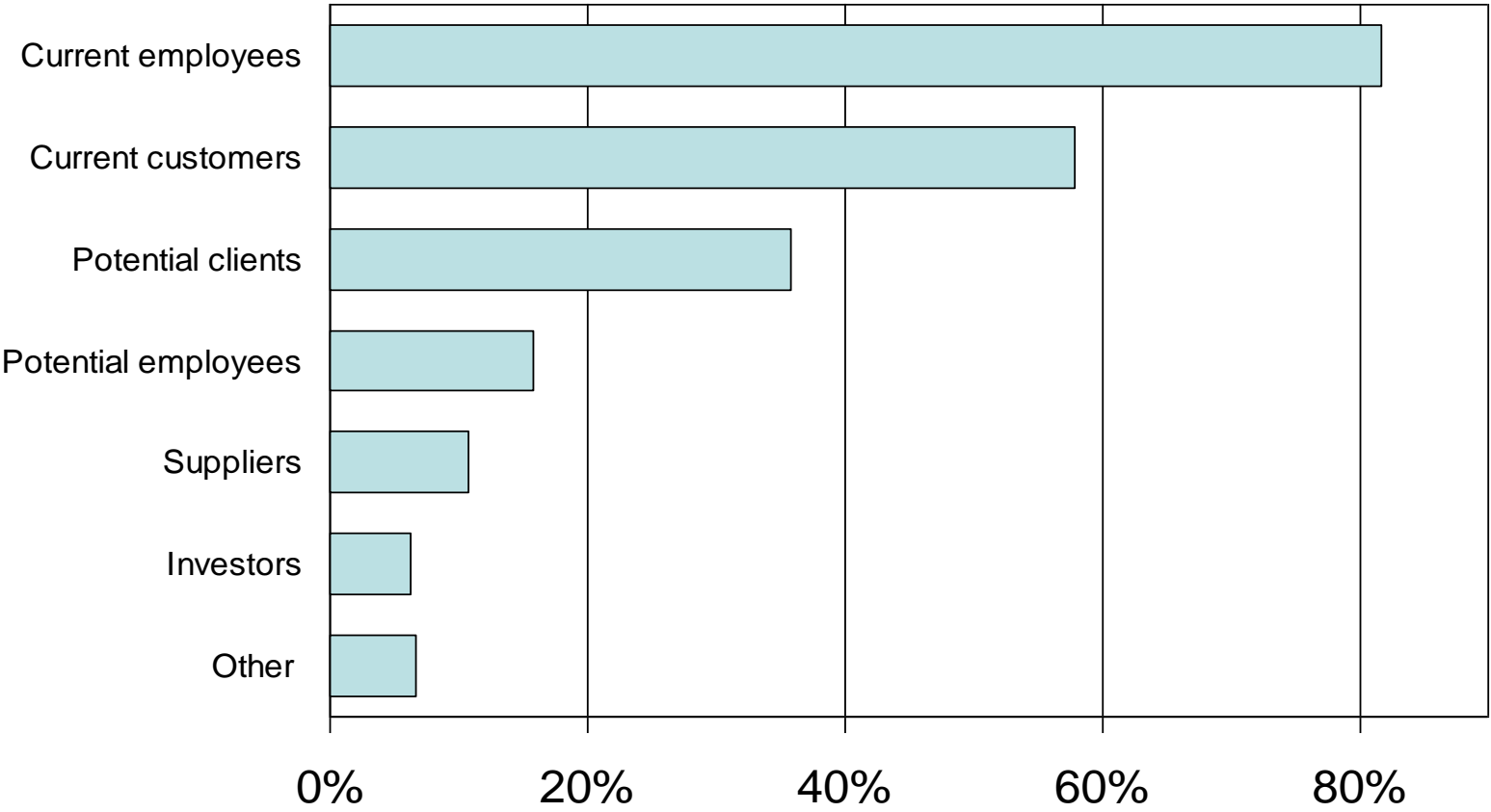
# Web 2.0 Technologies Implemented



Q: Which Web 2.0 technologies have people in your organization or company implemented for company-related purposes? (Please select all that apply.) Base: Currently Using and Planning to Use Web 2.0. N=282



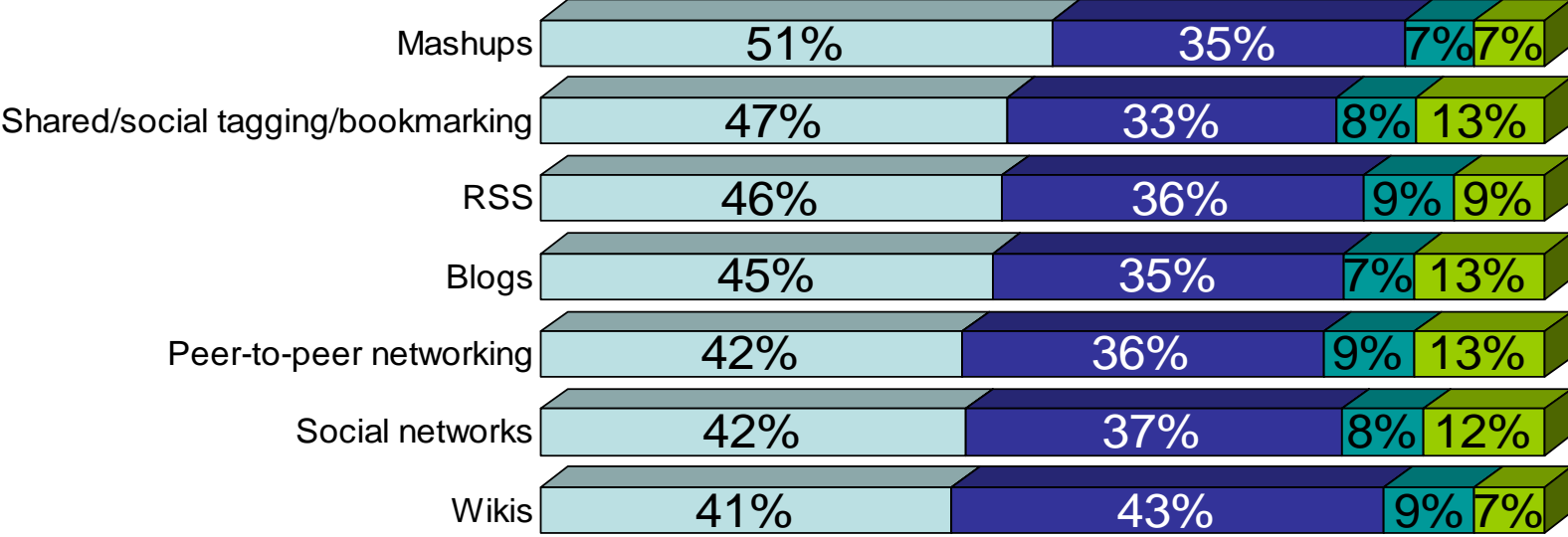
# Groups Web 2.0 Implementation Seeking to Serve



Q: Which Web 2.0 technologies have people in your organization or company implemented for company-related purposes? (Please select all that apply.) Base: Currently Using and Planning to Use Web 2.0. N=282



# Current Status of Web 2.0 Deployment



■ Company-wide ■ Some departments ■ One department ■ Some individuals

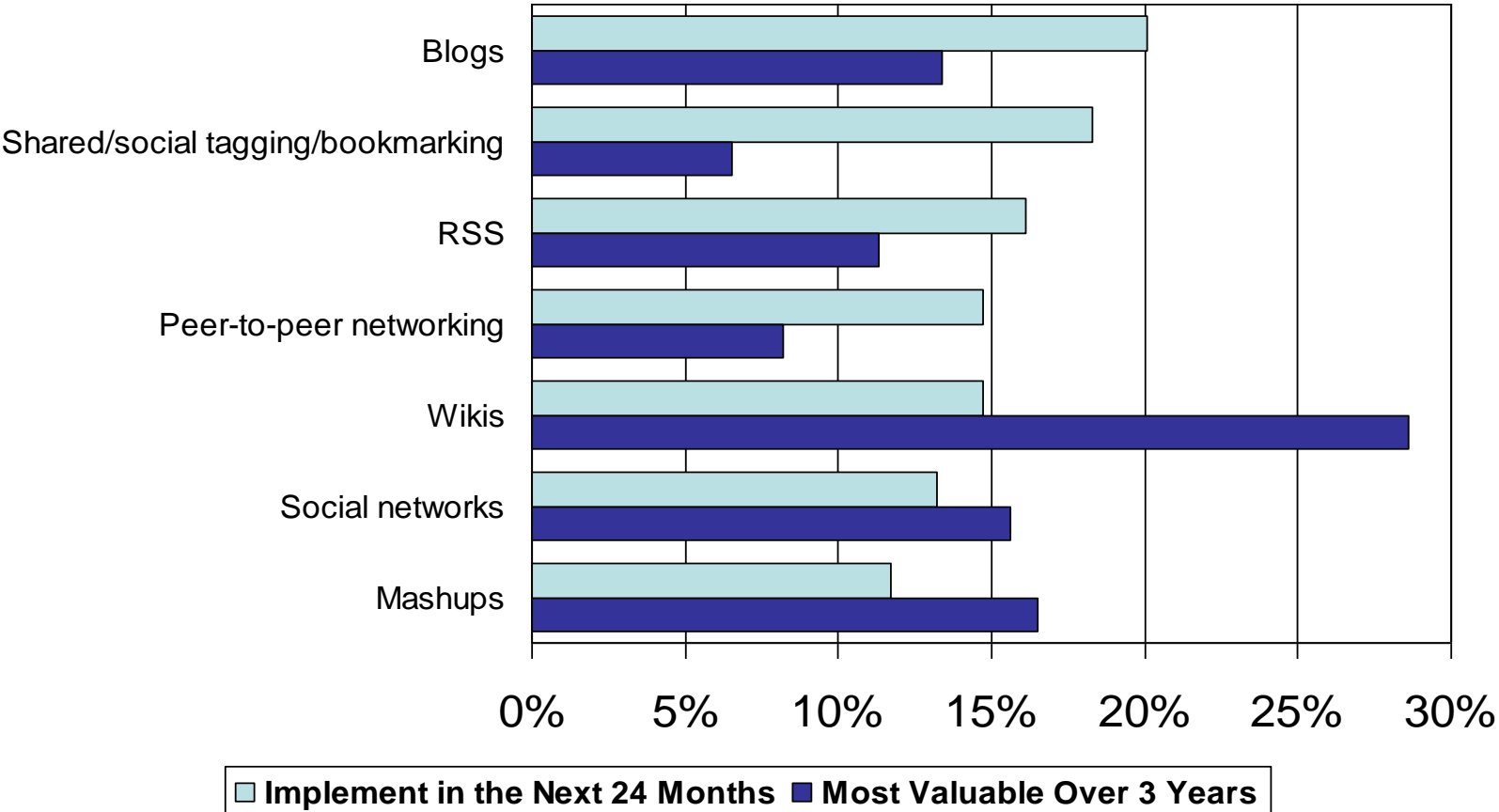
Q: Which best describes how widely the below Web 2.0 technologies have been deployed within your company? (Please check 1 item in each row.) Base: Currently Using and Planning to Use Web 2.0. N=231

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# Technologies Planning to Implement in the Next 24 Months and Most Valuable Over the Next 3 Years

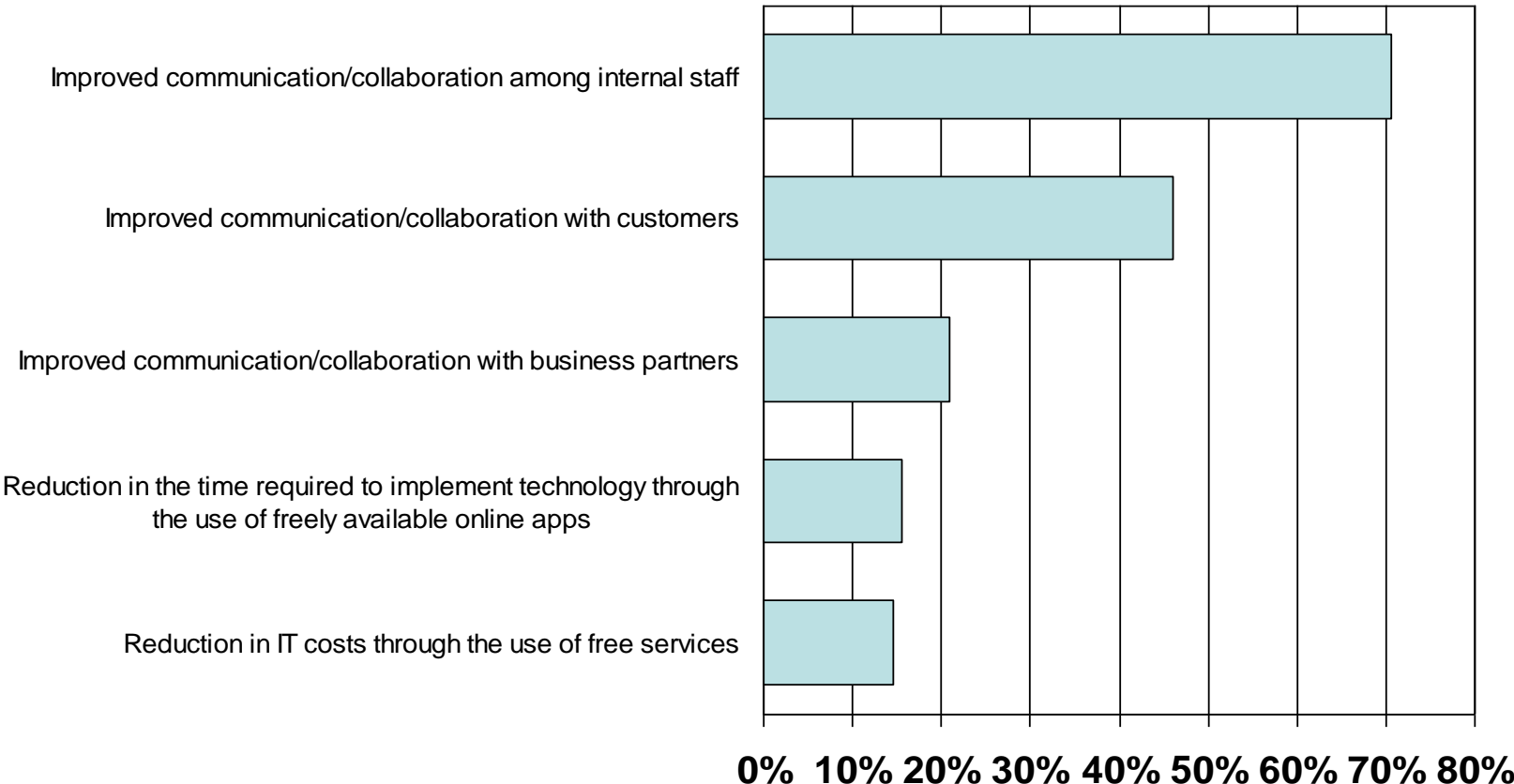


■ Implement in the Next 24 Months ■ Most Valuable Over 3 Years

Q: Which Web 2.0 technologies are people in your company planning to implement within the next 24 months for company-authorized activities? (Please select all that apply.) Base: Currently Using and Planning to Use Web 2.0. N=273 Q: Which 1 of the following Web 2.0 technologies do you think will end up being the most valuable to your company over the next 3 years? Base: Currently Using and Planning to Use Web 2.0. N=231



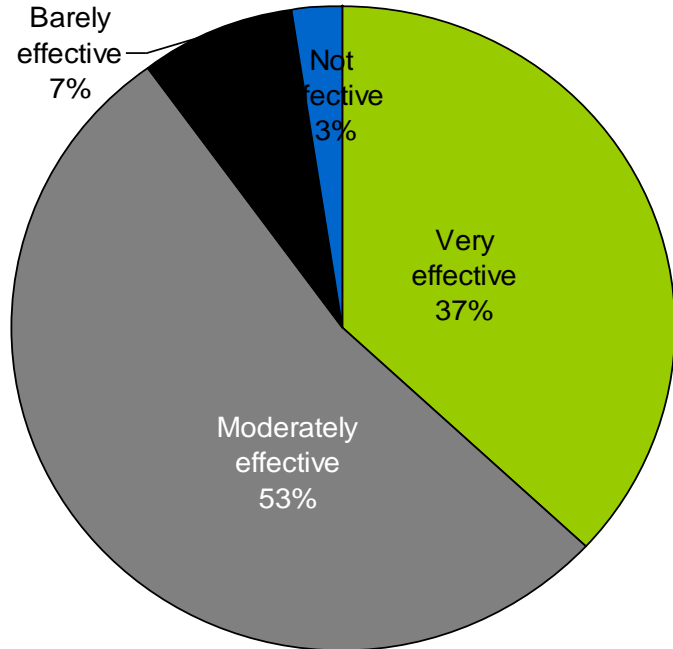
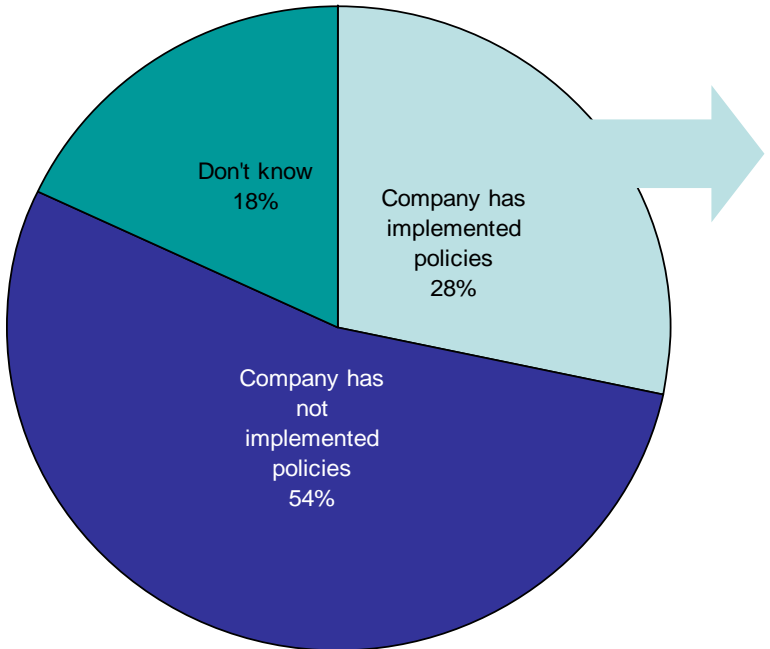
# Drivers for Implementing Web 2.0



Q: Which 2 of the below are most driving your company to use Web 2.0 technologies? (Please select up to 2 responses.) Base: Currently Using and Planning to Use Web 2.0. N=282



# No Controls on Web 2.0



Q: Has your company implemented policies regulating the use of Web 2.0 technologies by employees? Base: Currently Using and Planning to Use Web 2.0. N=282 Q: How effective have these policies been at preventing unauthorized use of Web 2.0 technologies? Base: Currently Using and Planning to Use Web 2.0. N=81

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# Storage Growth



- Worldwide external disk storage systems factory revenues posted 9.8% year-over-year growth in the fourth quarter of 2007 (4Q07) and totaling \$5.3 billion, according to the IDC Worldwide Disk Storage Systems Quarterly Tracker. For the quarter, the total disk storage systems market grew to \$7.5 billion, up 7.6% from the prior year's fourth quarter. Total disk storage systems capacity shipped reach 1,645 petabytes, growing 56.3%. --- IDC

# Spending on the Rise



- Worldwide Storage Systems Hardware, Software, and Services Revenue
- 2008 -- \$78.9 billion
- 2009 -- \$82.8 billion
- 2010 -- \$86.3 billion
  
- Source: IDC, May 2008

# No Signs of Slowing



- Revenue growth of 10.2 percent worldwide year over year indicates that the storage market is still in strong demand. Capacity shipments grew 48.9 percent year over year to 1.1 million terabytes showing the continuing mounting need for additional storage,” -- Robin Burke, research vice president for Gartner’s global Storage Quarterly Statistics program.

# No Signs of Slowing



- Through 2012, the new accelerator will be the emergence of more content-centric businesses, according to IDC. Worldwide disk storage systems capacity shipments will continue to more than double every two years, growing at a compound annual growth rate of nearly 53% from 2007 to 2012, while spending will pass the \$34 billion mark in 2012.
- By 2011, the hard disk drive (HDD) industry will more than quadruple the total HDD capacity shipped in 2006 to meet the growing storage requirements of an expanding digital universe, according to IDC. Worldwide HDD unit shipments will increase to 675 million units in 2011, while revenue will rise to approximately \$37 billion.

# Culprits and Issues



- Video -- 2 hours of broadcast quality, compressed video/audio require approximately 8Gigabytes
- HD Video
- Podcasts
- Photography
- E-Mail and Attachments
- Higher Resolution Applications
- Business Intelligence and MashUps
- Limited Search and Indexing Tools
- Latency Sensitive Apps Running on Distributed Networks
- Performance of Large Files
- Not Enough People and No Management Tools

# Storage Futures



- IDC Says Successive generations of HDD products using perpendicular magnetic recording (PMR) technology will enable average HDD capacities to increase by nearly threefold by 2012.
- Storage Virtualization, Compression and De-Duplication will be key tools.
- Better Data and Storage Management Tools.
- Emergence of Solid-State Disk Drives
- Storage-as-a-Service Matures

# Conclusion



- While hardware may keep pace with growing storage requirements, staffing requirements will not.
- While there is some help on the way in terms of future technology advancements, what is really going to be required is a new approach to managing files and across the network with lots more caching and pooling of storage assets to support demands for higher levels of quality of service.
- Time to rethink storage architecture is now

# Extreme Storage from HP

Ian Duncan  
Marketing Director, HP Scalable NAS  
August 2008





# HP StorageWorks 9100 Extreme Data Storage System

Integrated hardware/software solution

1. Blades – **HP's Industry Leading Blade Solution**
  - Up to 12.8 cores/U
  - Starting at 4 blades, expand up to 16 blades
  - BL460 blades in c7000 Enclosure
2. Storage – **Industry Leading Density**
  - Up to 12TB/U
  - Starting at 246TB, expand to over 820TB
  - Scales in 82TB Storage Blocks
3. Software – **Proven in Content Rich Environments**
  - Integrated system management
  - Multiple access protocols
    - Streaming media or custom applications
    - Applications can run directly on blades



Performance blocks



Storage block

# Enabling Business

## Benefits of HP Extreme Data Storage

### Photo Sharing Providers

- Scalability - Store, host and deliver billions of photos for millions of users
- Manageability - Manage petabytes of online photo storage per admin
- Affordability - Employ inexpensive Tier 2 archive for full size images



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### Streaming Media Providers

- Scalability - Store and Ingest 25K+ hours of multi-format HD movies
- Manageability - Reduce footprint by consolidating streaming apps on system
- Affordability - Deliver streams at a fraction of the traditional cost



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### Telco Providers

- Scalability – Host multiple web and multimedia services
- Manageability – Shorten deployment time from weeks to minutes
- Affordability – Lower \$/service cost enables new business opportunities







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