

F R O S T & S U L L I V A N

2024 COMPANY OF THE YEAR

*IN THE GLOBAL HYBRID
CLOUD STORAGE
MANAGEMENT
INDUSTRY*

 **NetApp**

F R O S T & S U L L I V A N

BEST
2024 PRACTICES
AWARD

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. NetApp excels in many of the criteria in the Hybrid Cloud Storage Management space.

AWARD CRITERIA	
<i>Visionary Innovation & Performance</i>	<i>Customer Impact</i>
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Mega Trends	Customer Purchase Experience
Implementation of Best Practices	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Financial Performance	Brand Equity

Businesses require strong management processes for their hybrid storage environments

In the slow global macroeconomic environment, businesses must squeeze every bit of utility out of every infrastructure resource—whether cloud-based or data center—using the least amount of labor to do so. This allows them to contain infrastructure costs when budgets are reduced.

Despite the stagnant economy, businesses are still investing in technology. In order to provide the robust digital foundation within stagnant or shrinking budgets, businesses must invest in strong management and orchestration to ensure that they fully utilize their IT infrastructure. The strongest management suites now use automation – the carrying out of routine tasks via pre-set policies and rules that trigger automatic actions. For example, automated security response functions can improve overall protection, as employees don't have to manually react to changes to the environment (which may indicate a data breach); rather the system can respond exactly at the moment that an electronic threshold is breached. Likewise, cost or app optimization can be automated using pre-set policies. When the environment changes in a way that can negatively impact monthly costs to run cloud apps, policies can trigger automatic actions to mitigate the change. Many providers have integrated automation—particularly AI-driven automation, in which AI is used to suggest best-practice policies or triggers that prompt an action—in their hybrid cloud management platforms.

For many businesses, automating management of the hybrid storage environment is necessary to ensure they have the right resources to support their digital transformation initiatives, particularly AI deployments. Automation helps businesses employ consistent security and governance policies to protect critical data across their entire IT landscape. As businesses struggle with a lack of expertise and staff to handle such tasks manually. Automating hybrid cloud management also reduces the potential for human error.

Businesses require automated management tools that enable easy, efficient, and consistent management of all environments. For hybrid storage environments, one provider—NetApp—has risen to the task and launched a hybrid storage management platform that offers the sophisticated features of a hybrid cloud management platform, specifically tuned for the storage infrastructure.

BlueXP Addresses Customer Needs for Storage Management with an Industry-Leading Solution

NetApp® BlueXP™ is a unified control plane delivering visibility and control of storage and data services across on-premises and cloud environments. It delivers seamless insights and automation, flexible consumption control, and integrated data protection. BlueXP also enables the discovery, deployment, optimization, and management of storage and data services across NetApp on-premises systems, public cloud instances, first-party hyperscaler services, Kubernetes infrastructure, and even third-party hyperscaler object storage.

“BlueXP delivers seamless management across storage with integrated environment health and analytics, protection, governance, optimization, and mobility. It enables customers to create consistent and common policies, procedures, and services across all infrastructures under management, reducing the complexity of administering hybrid multicloud environments.”

***- Karyn Price
Industry Principal, ICT***

Unlike other cloud management platform providers that focus solely on infrastructure instances, BlueXP leverages NetApp’s heritage storage management experience to manage the data within the instance, as well as the infrastructure that houses it. The platform brings together an array of capabilities for managing, storing, and protecting data across formerly disparate environments, without the need for different toolsets or frameworks. BlueXP delivers seamless management across storage with integrated environment health and analytics, protection, governance, optimization, and mobility. BlueXP also

uses advanced API , Connector, charging, tenancy, and IAM technologies, plus core services to help customers securely connect to the resources they need, including hyperscaler marketplaces. The digital wallet service helps customers visualize, maintain, monitor, and protect IT investment resources. It enables customers to create consistent and common policies, procedures, and services across all infrastructures under management, reducing the complexity of administering hybrid multicloud environments.

NetApp BlueXP Leverages AI, Automation to Enhance Management Capabilities

BlueXP offers integrated artificial intelligence operations (AIOps) to provide insights, automation, and detailed user and data activity auditing. The BlueXP wizards and policy-based automation reduce risks and enable generalists to perform highly specialized management tasks. The platform also delivers fact-based,

comprehensive sustainability reporting to help customers reduce their carbon footprints. NetApp's

“While different than the standard hybrid management platform, BlueXP fills a much-needed gap in the hybrid cloud management market, managing data storage and service infrastructure across the hybrid environment. Its AIOps approach is forward-thinking and leads the market in terms of functionality for hybrid data and storage management.”

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support systems collect over 25 million inputs/hour from hundreds of thousands of NetApp controllers worldwide, adding to a multi-petabyte data lake that processes trillions of data points each month. These live telemetry inputs include power and thermal datapoints at the node and cluster level. With this information, customers are provided insight into actual power, thermal, and carbon usage as well as projected metrics over the next month, quarter, or year, assuming workloads/capacity remain constant. BlueXP's AIOps capabilities interpret this data and produce recommendations for implementation of

technology, policies, and procedures such as application of compression, tiering, or cloning to help reduce resource, power or carbon consumption.

BlueXP fills a much-needed gap in the hybrid cloud management market by focusing on data storage and service infrastructure across the hybrid environment. Its AIOps approach is forward-thinking and leads the market in terms of functionality for hybrid data and storage management.

BlueXP Helping Enhance NetApp Performance, Leadership Position

NetApp recorded a slight rise in overall revenues in 2023, thanks in part to the rollout of the BlueXP platform. Continued innovation on BlueXP is expected to help bolster revenues for the remainder of the 2024 fiscal year. BlueXP adoption continues to strengthen, and customers are receiving this hybrid cloud service positively, according to NetApp CEO George Kurian in a recent earnings report.

NetApp Makes BlueXP Procurement, Ownership, Service Easy for Customers, Especially Those in Regulated Industries

Delivered as a SaaS platform, BlueXP can be deployed across the entire hybrid and multicloud environment. The platform can help customers discover, deploy, manage and optimize environments on-premises, in public clouds, hybrid multicloud, or regional private clouds deployments. Currently, AWS, Google Cloud Platform (GCP) and Microsoft Azure are supported. The company claims to be the only provider with first-party cloud storage services in all three major clouds.¹ For restricted industries, optional government secure cloud and private “dark site” modes are also available making it easier for customers in regulated industries to adopt and use the solution. The standard mode of the service works at the SaaS layer using encrypted data transmission through the public internet. In Restricted mode, NetApp deploys the service for the customer in GovCloud, secret, or regulated regions for state, government, or public sector organizations. Similarly, in Private mode, NetApp deploys the service for the customer in an isolated environment for organizations that operate under the strictest security protocols.

¹ [“NetApp Shakes Up Cloud Portfolio After ‘Strategic Review’,” CRN Online, November 29, 2023](#)

Once deployed, NetApp has also enabled digital advisor service processes that deliver intelligent insights and guidance to make support easier for customers as well. The company has digitized its support experience by integrating NetApp Active IQ, an AI-Powered Digital Advisor that simplifies the proactive care, optimization, and security of the NetApp environment, with guided remediation.

Conclusion

With its BlueXP hybrid storage management platform, NetApp has met an unmet need in the hybrid cloud management industry, offering robust yet consistent storage management capabilities to its customers. For its strong overall performance, NetApp is recognized with Frost & Sullivan's 2023 Global Company of the Year Award in the hybrid cloud storage management industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Award Analysis

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed by a robust solution development process

Visionary Scenarios Through Mega Trends: Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first-to-market solutions and new growth opportunities

Leadership Focus: Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate a consistent and repeatable level of success

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Engine™

Frost & Sullivan’s proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

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Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

