



Commoditization for Growth

Fragmentation of Flash Solutions
Slows Market Adoption

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Flash Devices Need Standards

- Will flash solutions mimic the HDD industry?
 - Common interfaces
 - Standard drivers
 - Consistent form, fit, function for given application
- Standards drive commoditization
 - Devices can be multi-sourced
 - Competition drives down prices
 - Adoption rates will increase

Software as Value Add?

- Flash device vendors acquiring software
 - Providing flash and storage resource management
 - Differentiation from competitors to preserve price
- Is software from device manufacturers a stop-gap?
 - Software adds features not present in OS
 - Vendor-specific software limits multi-sourcing
 - Will system vendors/OS providers develop features that marginalize added software?

Standardization Drives Consolidation

- Only the strong will survive commoditization
 - Highest quality and performance
 - Best product development and support
 - Low internal costs to support \$/GB declines
- Can device suppliers move up the food chain?
 - Flash arrays, caching appliances
 - Open source-based integrated solutions for hyperscale



Thank You!

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