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## **The 451 Group: Limitations in Data Management Capabilities Cause Many Large Enterprises to Delay Grid Deployments**

*Users are frustrated with technology vendors that are not helping them manage data on grids; Industry leadership in this area is up for grabs*

*New York, August 18, 2005* – The 451 Group has found that many large enterprises have delayed broadening their grid deployments because of limitations in data management capabilities. Managing data on grids is a core capability and a key driver for enterprise grid adoption, but users have been frustrated by the lack of progress from vendors in meeting this need and have had to rely on their own resources to successfully manage data on grids. These findings appear in a report released today by The 451 Group, a New York-based technology industry analyst company focused on the business of enterprise IT innovation.

“At this point, the compute grid is well understood. But much less time has been devoted to getting data where it needs to be, when it needs to be there, as well as to how this process is managed,” said John Abbott, Chief Analyst at The 451 Group and principal author of the report. “As the momentum of commercial grid computing builds, the ability to put data in the most suitable places – so that it can be shared with other applications when required – is becoming increasingly important. Leadership in this area is up for grabs.”

The 451 Group has found that enhanced data management capabilities could soon become a primary motivating factor for deploying grids in the first place – promising simplified administration and more cost-effective and efficient use of storage and processing resources. Most early adopters have far-reaching plans to extend their grid activities from initial beachheads to multi-application and cross-organizational grids; however, without proper data management tools in place, applications will not perform well on top of a grid infrastructure, and the expected cost and performance advantages of implementing a grid will not be realized.

The 451 Group's analysts believe that managing data on grids requires a combination of caching, data movement, data quality, data streaming, data transformation, global resource namespaces, replication and storage volume virtualization, depending on the application and system architecture. Vendors have taken widely differing approaches to this problem, from tackling one aspect alone to attempting to build a complete stack, and from very grid-specific solutions to making a deliberate effort to not even mention grids.

“As it stands now, no single approach – with the exception that a virtualized environment is necessary – or single vendor or group has a leadership position, and no one can address data management on every part of the stack,” said Steve Wallage, Director of Research at The 451 Group. “Grid middleware and scheduling vendors themselves have not ignored data management issues, especially as they seek to address a broader piece of the grid ‘stack,’ penetrate new markets and move beyond high-performance computing grids. The problem is that data management is not part of their core skill set.”

The 451 Group has found that traditional data management techniques are well established, but they were designed to run on centralized mainframe or client/server architectures and need to be adapted and extended for grid architectures. For the dynamic data management required by many applications, such as those within the financial services industry, new approaches are necessary.

“We expect to see increasing data management support for grids embedded within application servers and databases. But this implies a return to a more centralized application-server approach that doesn't fit easily into grid architectures. An alternative development-platform-oriented model, supporting multiple programming language interfaces, will continue to be a requirement,” said Abbott.

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The report, “Grid Computing – Managing Data on Grids,” is the sixth one in the 451 Grid Adoption Research Service (GARS) – an investigation into user experiences and vendor strategies. The 96-page report was written by John Abbott, with Steve Wallage and William Fellows, Principal Analyst. This report examines the challenges and the possible solutions in managing data on grids, from both user and vendor perspectives. It analyzes the approaches of seven users, which have often needed to rely on their own capabilities to successfully manage data on grids. It also analyzes 28 technology vendors and highlights the various products and players across the data management landscape.

### **Key Companies Covered**

The report includes in-depth competitive assessments of the following vendor companies (although this is not a complete list of companies covered in various sections of the report): ActiveGrid, Ciphergrid, Exludus, GigaSpaces, Paremus, Tangosol, TurboWorx, GemStone, InterSystems, Integrasoft, Objectivity, Progress Software, Avaki (Sybase), DataSynapse, Hewlett-Packard, IBM, Platform Computing, Sun Microsystems, United Devices, Informatica, Oracle, EMC, Ibrix, Network Appliance, TimesTen (Oracle), Nirvana Storage, Microsoft and SAS.

User case studies include the following early-adopter companies: ABN Amro, Audi, Bear Sterns, GlaxoSmithKline, Markit and Sanofi-Aventis.

### **Report Orders**

To learn more about this report, or to discuss developing a client relationship with The 451 Group, contact Simon Carruthers, Vice President of Research Services, via phone at 212-505-3030 x-103, or via e-mail at: [simon.carruthers@the451group.com](mailto:simon.carruthers@the451group.com).

### **About The 451 Grid Adoption Research Service (GARS)**

The 451 Grid Adoption Research Service (GARS) – an investigation into user experiences and vendor strategies – extends The 451 Group's proven expertise in analyzing the grid technology market. This service analyzes the track record as commercial enterprise users introduce grid technologies to their core IT operations, and it examines the effectiveness of the strategies of vendor companies whose technologies early adopters are deploying. It is an extension of The 451 Group's analytical program on grid computing, which provides an assessment of customer demand, looking at the opportunities and challenges facing early adopters and covering adoption within key industries. It also presents the unique opportunities and challenges in specific vertical market segments.

### **About The 451 Group**

The 451 Group is an independent technology industry analyst company focused on the business of enterprise IT innovation. The company's analysts provide critical and timely insight into the market and competitive dynamics of innovation in emerging technology segments. Clients of the company – at vendor, investor, service-provider and end-user organizations – rely on 451 insight to support both strategic and tactical decision-making for competitive advantage.

The 451 Group is headquartered in New York, with offices in key locations, including San Francisco, London and Boston. For additional information on the company or to apply for trial access to its services, go to:

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