

A periodic newsletter with links to blogs and industry news for subscribers to the Architecting IT blog.

[View this email in your browser](#)

This is newsletter #43, 2018-W5 published on 3 February 2018.



architectingIT



What's Next for Dell?

What a week we've seen in the tech industry. Dell is reported to be considering either a reverse merger or restructuring of the business to inject some kind of impetus into reducing the multi-billion dollar debt still outstanding following the acquisition of EMC. Red Hat continues to build momentum in containers by acquiring CoreOS and both Google and Amazon continue to report rises in revenue from cloud.

Dell VMware Technologies, Inc

Could this be the new name going forward? OK I'm being fairly facetious here, but the restructuring of Dell is no longer speculation, following an SEC filing by

the company ([see this article and link](#)). VMware has been on a roll recently, with rumours pushing the share price as high as \$150 at the end of January.

That part of the business is booming, but storage isn't so much. Traditional storage is stagnant with plenty of competition. The old EMC has never been that successful in moving to software-defined storage and new platforms are coming along to steal new business (see the first post in the section below).

Focusing on the value of VMware could be interesting, but Dell is a huge company selling PCs, servers, networking, storage and software. HPE changed their business by splitting in two. Would it make sense for Dell to do the same?

Container Alert

Red Hat is building out more IP with containers by acquiring CoreOS. The CoreOS team basically went head-to-head with Docker when they developed rkt, a competitor to the Docker container engine. Eventually both conceded to working with CNCF on a container standard, however I doubt there's any love lost there.

Docker Inc is now in a bind, because the most popular Enterprise Linux platform can now embed their own container engine and offer full orchestration to boot. What will Docker do? Maybe an acquisition by the newly emboldened VMware Dell Technologies Inc could be a strategy....

Cloud Power

Google reported this week they've reached \$1 billion a quarter in cloud revenue. AWS made \$1.35 billion in income from \$5.11 billion in revenue for their last quarter. Is anything going to stop this transformation? At the moment it doesn't look like it.

What do you think?

Chris Evans

If you would like to change your preferences, every email has an option for change or to unsubscribe at the end. You can select to receive the weekly summary, new blog posts or both. Click on the button below to set your preferences.



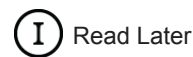
New Architecting IT Blog Posts...

- [In Storage, Software is the New Hardware](#) (2 February 2018)
- [What is the Technology Behind Samsung Z-NAND?](#) (31 January 2018)
- [Whatever Happened to VVOLs?](#) (29 January 2018)

New Storage Unpacked Podcasts...

- [#36 - The Persistence of Memory with Rob Peglar](#) (2 February 2018)

We're interested in your feedback! Is there anything you would like to see covered in these newsletters or on the blog? Do you have an opinion on any of the content? Just hit reply to this email or continue the conversation online: [@architectingit](#) on Twitter, or via [LinkedIn](#).



You can [update your preferences](#) or [unsubscribe from this list](#)