Magic Quadrant for Enterprise Storage Platforms

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Enterprise storage platforms offer platform-native service capabilities and product features for both structured and unstructured data workloads. Heads of infrastructure and operations should use this research to assess vendors in deploying a modern IT infrastructure platform for block, file and object storage.

Strategic Planning Assumptions

- By 2028, more than 20% of enterprises will run AI workloads (training and/or inference) in on-premises data centers, an increase from less than 2% as of the beginning of 2025.
- By 2029, consumption-based storage as a service (STaaS) will replace 50% of on-premises enterprise storage and data services infrastructure capital expenditure (capex), an increase from 15% in early 2025.
- By 2029, 100% of storage products will include cyberstorage capabilities focused on active defense beyond recovery from cyber events, up from 20% in early 2025.

Market Definition/Description

Gartner defines enterprise storage platforms as the market consisting of products, value-based services and delivery methods designed to support diverse block, file and object storage workloads and use cases. Products and services include appliances, software-defined storage (SDS), data management and other data storage services provided through a centrally managed, multidomain control plane. Enterprise storage platforms address IT organizational requirements to operate and support standardized enterprise storage

products. They also enable organizations to adopt a platform-services-centric infrastructure approach for structured and unstructured data applications. These platforms leverage AI-enabled telemetry to provide optimal infrastructure capabilities and SLA-based IT outcomes.

Enterprise storage platforms enable the on-premises and hybrid cloud operating model to increase flexibility, improve productivity and efficiency, improve asset management, automate continuous cost optimization and enhance cyber resilience within the data storage environment. The foremost purpose of enterprise storage platforms is to support structured and unstructured storage, hybrid platform-native storage and data storage service workloads.

Enterprise storage platforms allow IT clients to consolidate multiple vendors across block, file and object workload infrastructure to simplify vendor management, reduce sourcing complexity and enable platform SLA-based outcomes. Use cases range from databases, to file and object systems, to backup and archiving. Global enterprise storage vendors have the technological, financial and operational means, platform strategies and roadmap initiatives to deliver enterprise storage platform products and services.

Storage as a service (STaaS), cyberstorage resilience, and enterprise storage platform features and capabilities enable platform-native, consumption-based model (CBM) services to support IT operations SLAs. SLAs provide proactive, tangible outcomes by leveraging advanced AI-enabled telemetry that uses real-time data collection and monitoring, in conjunction with machine learning technology, to enhance IT operations and support processes. The storage controller operating system is the foundation for platform innovation, providing a path to an SDS architecture that enables and simplifies hybrid IT platform services for multidomain infrastructure operations management.

Mandatory Features

- Support for structured and unstructured data workloads enabled by data access over block and either file or Amazon Simple Storage Service (S3) protocols. Protocol support must be native to the platform, not through a gateway or an external product.
- Primary block storage platform offerings to support structured data applications, including relational database management systems (RDBMS), virtualization and container virtualization.
- Either object or file-based data services to support unstructured data applications, including high-performance file and key-value repositories.

- Native capabilities to protect from data loss, ensuring a minimum of 99.9999% service-level assurance (SLA) data availability.
- Support for a container management platform through a dedicated CSI plug-in.
- Either RAID or erasure coding data protection, redundancy and fault tolerance capabilities without any single point of failure.
- API-centric central control plane for hybrid-cloud IT operations and storage management services, including orchestration and provisioning of distributed storage services.

Common Features

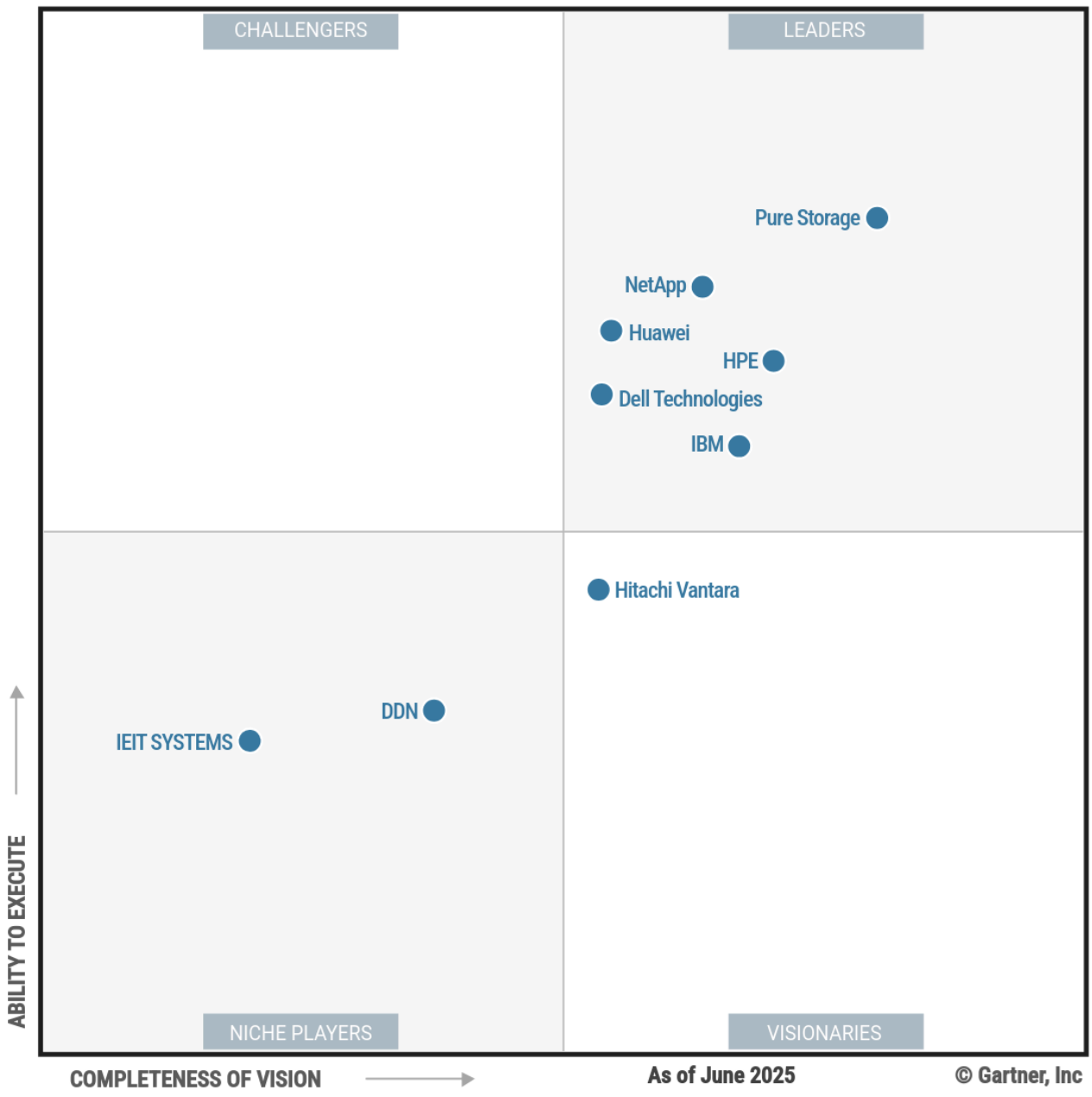
- Artificial intelligence for IT operations (AIOps) capabilities, typically provided by applying AI on telemetry data, leverage AI and machine learning to enable predictive insights for:
  - Prescriptive health management
  - Improved customer support
  - Proactive capacity and performance management
  - Nondisruptive workload simulation, placement and migration/tiering
- A distributed file architecture presented as a single namespace to scale the data stored across multiple servers/nodes. This feature supports linear scaling of performance and capacity pooled across multiple storage nodes based on shared-nothing or shared-everything architecture principles. In addition, data and metadata should be distributed over multiple nodes in the cluster to handle availability and data protection in a self-healing manner.
- Multiple block and either file or object STaaS performance tiers available in a pay-for-use, consumption-based license or a pay-for-access subscription.
- Support for a global file namespace that can span storage in multiple geographic locations at the edge, in on-premises data centers and on hyperscale public cloud platforms.
- IT operations SLA-based outcomes, including:
  - Productivity and operational efficiency, including cost optimization (e.g., reduce storage cost per terabyte by 5% to 10% annually)

    - Asset management and financing, including proactive capacity management (e.g., 90% or better accuracy over a three-month period), optimized utilization levels and carbon dioxide emissions to enable reporting as measured in total kilograms of CO2 per terabyte (kg CO2e/TB) of power used
    - Continuous workload and cost optimization, including workload simulation, planning, placement and tiering/migration services
    - Platform ecosystem syndication, integration and certification of third-party products and services
    - Cyberstorage capabilities — including advanced cyberthreat detection within the I/O data stream, real-time scanning and rapid recovery
- Software-defined storage (SDS) deployment capability to operationalize native hybrid cloud and native public cloud storage infrastructure services with a minimum of one major public cloud, such as AWS, Azure or Google Cloud Platform.
- A software-defined disaggregated architecture to support a multi-protocol storage architecture that logically separates the vendor's storage media hardware from the storage controller operating software managing the storage system and adjoining infrastructure.
- A unified block and either file or object hardware architecture to provide an interchangeable and nondisruptive common workload infrastructure management environment.
- Capacity arrays built on the highest-density quad-level-cell solid-state-drive (QLC SSD) flash media for price-sensitive applications or use cases:
    - Special purpose or next generation QLC NVMe SSD for enhanced performance, endurance, management or other critical storage services capabilities
    - Advantaged arrays using NAND and other components sourced directly from a semiconductor provider
- Data management services to create metadata classification enabling cost optimization, governance, mobility, analytics and security.
- A nondisruptive data migration service that enables migration of array/SDS data from one platform to another with 100% data availability.

- Data reduction capabilities with guaranteed ratio for compression or deduplication.
- Storage features that better support AI applications/workloads.

Magic Quadrant

Figure 1. Magic Quadrant for Enterprise Storage Platforms



Gartner

Vendor Strengths and Cautions

DDN

DDN is a Niche Player in this Magic Quadrant. Its DDN storage platform consists of Infinia (a software-defined data platform for unstructured workloads), EXAScaler parallel file system, and IntelliFlash and Tintri VMstore for structured workloads. Its long-standing engineering heritage in high-performance computing (HPC) makes it well-suited for AI deployments. DDN's operations center in North America and select countries in Europe and Asia/Pacific target large enterprises with high-performance or technical computing needs. While IntelliFlash saw evolutionary improvements in performance and AI-based analytics over the last year, DDN's main advancements were in Infinia, including advanced native multitenancy, enhanced data services such as stretch-cluster support and improved Amazon Simple Storage Service (Amazon S3) performance.

Strengths

- **Strong NVIDIA partnership:** DDN's joint partnership initiatives and integration with NVIDIA's IT infrastructure is more advanced than other companies evaluated in this Magic Quadrant, reducing the complexity of building and scaling AI infrastructure and graphics processing unit (GPU) ecosystems, while minimizing risks and accelerating time to value.
- **Specialization in high-performance workloads:** DDN maximizes cost-of-ownership efficiencies of expensive AI and HPC GPU infrastructure resources, while reducing analytics pipeline runtimes, producing quicker insights.
- **Scales to customer needs:** Long-standing expertise and focus on its core customers and workloads, reinforced with new funding from Blackstone, enables DDN to help heads of I&O scale operations to meet large enterprise-specific needs.

Cautions

- **Narrow market focus:** Its focus remains narrowed on HPC and AI markets, giving DDN a limited presence and experience in other segments of this market.
- **New but limited platform:** Infinia 2.0 became generally available in February 2025, and it is currently limited in its file system services and advanced native platform capabilities, such as centralized fleet management, policy-based workload automation and ransomware detection based on broad customer feedback.
- **Planned Infinia migration:** DDN's structured data product offerings are not expected to migrate to the unified Infinia platform, which is likely to limit investment and innovation for existing IntelliFlash customers that are not migrating to that platform.

Dell Technologies

Dell Technologies (hereafter referred to as Dell) is a Leader in this Magic Quadrant. Its storage portfolio includes PowerStore for structured data and PowerScale for unstructured data, both manageable under Dell's AIOps SaaS platform for monitoring and proactive remediation. Both products are also available as storage as a service (STaaS) through Dell's APEX service. The company is geographically diverse and targets global midsize to high-end enterprise markets across all verticals. In the past year, Dell introduced PowerStore advancements, such as enhanced data efficiency, a 5-1 data reduction ratio (DRR) guarantee and quad-level cell (QLC)-based solid-state drives (SSDs). For unstructured data, Dell launched Dell AI Data Platform, leveraging PowerScale as the storage foundation, which includes S3 over RDMA, Network File System (NFS) over Remote Direct Memory Access (RDMA), and NVIDIA Data Processing Unit (DPU) integration. Other updates include PowerScale for Microsoft Azure, MetadataIQ-enhanced data management, 122TB QLC flash and 20% compression improvement and quality of service (QoS) on files.

Strengths

- **Eases AI adoption:** Dell's AI Factory with NVIDIA eases AI adoption for clients preferring a full-stack AI-ready solution consisting of GPU servers, networking, storage and AI software, along with consulting services.
- **Broad storage portfolio:**Dell's broader storage portfolio includes multiple complimentary products to address specific use cases, including PowerMax (mission-critical), ObjectScale (global-namespace object storage), PowerFlex (multi-petabyte scale).
- **Global operations:** Dell's global supply chain, support and sales make it an attractive vendor for organizations with global operations, as well as regional enterprises of all sizes.

Cautions

- **Limited platform capabilities:** Dell's platform capabilities lag other leading vendors in the Magic Quadrant, lacking common and modular building blocks, standardized controller software, and guaranteed IT operational SLAs.
- **Customer satisfaction challenges:** Multiple Gartner clients have expressed dissatisfaction in Dell's customer service, citing issues such as initial product quality, inconsistent support and multiday escalations.

- **OEM dependence for ransomware detection:** Dell lacks native cyberstorage capabilities to detect known ransomware signatures and has minimal anomaly detection. Dell depends on OEM applications to provide advanced cybersecurity.

Hitachi Vantara

Hitachi Vantara is a Visionary in this Magic Quadrant. It offers Virtual Storage Platform One (VSP One) — a unified data platform for block, file, object and mainframe storage — with mainframe storage that includes VSP 360 as its AI-powered control plane for hybrid cloud operations. Its EverFlex program provides storage as a service (STaaS) and data protection as a service (DPaaS). Hitachi Vantara has a global client base in large enterprise finance, government, healthcare, telco and manufacturing. In the last year, it introduced new QLC technologies for VSP One, launched its AI-powered VSP 360, partnered with NVIDIA for Hitachi iQ AI infrastructure and enhanced cyberstorage with a Cyber Resilience Guarantee, which uses immutable snapshots for data recovery.

Strengths

- **Unified storage platform vision:** Hitachi Vantara is strategically transitioning its offerings to a comprehensive platform solution by introducing VSP One, a unified data platform designed to natively support block, file and object storage.
- **Strong storage market reputation:** Recognized as a dependable provider, Hitachi Vantara supports critical workloads based on its long-standing industry experience, consistent focus on quality and established performance.
- **Global operations:** Hitachi Vantara's global operations ensure consistent, round-the-clock support in every region, backed by local experts and an extensive partner network.

Cautions

- **Lacks unified file/object maturity:** VSP One's unified file/object platform offering is nascent, with critical capabilities slotted to be delivered in the future.
- **Management complexity:** Some customer feedback describes Hitachi Vantara's management interface as outdated and confusing, and its setup and documentation as unclear. Consequently, some customers may experience integration challenges and potential operational delays.

- **Limited hybrid cloud capability:** Hitachi Vantara's hybrid cloud footprint is still emerging and is largely limited to the adoption of marketplace solutions centered on end-user data protection capabilities.

HPE

Hewlett Packard Enterprise (HPE) is a Leader in this Magic Quadrant. It offers HPE Alletra Storage MP products, such as B10000 for structured data and X10000 for unstructured data. These products support all workloads through a unified hybrid-cloud operating model, HPE GreenLake cloud. HPE serves customers of all sizes and verticals globally. In the past year, HPE integrated Alletra Storage MP into HPE Private Cloud solutions, introduced the X10000 for object workloads, and expanded its offerings with new service-level guarantees, improved energy efficiency and flexible capital expenditure/operating expenditure (capex/opex) options. It also enhanced its cyberstorage capabilities with native ransomware detection, immutable snapshots and air-gapped recovery. The B10000 is now available in Amazon Web Services (AWS) and Azure Marketplaces.

Strengths

- **Enterprise storage platform maturity:** HPE's enterprise storage platform presents a comprehensive set of capabilities built upon disaggregated, scale-out architecture that supports block, file and object storage, enabling independent scaling of performance and capacity.
- **Full-stack infrastructure capabilities:** HPE Storage is an integrated part of full-stack infrastructure platforms, with HPE Private Cloud AI and HPE Morpheus VM Essentials (VME) built on the Alletra MP and managed through the HPE GreenLake cloud.
- **Autonomous IT operations:** HPE's autonomous IT operations lead the market with agentic AIOps on GreenLake cloud and Alletra MP, providing predictive analytics, automated resource optimization and cross-stack observability.

Cautions

- **Overlooked market perception:** Some heads of I&O prospects often mistake HPE GreenLake for a financing or storage-as-a-service solution, overlooking its capability as a unified storage platform for diverse workloads across all delivery models.
- **Lack of maturity in unstructured data offering:** HPE's unstructured data product support is still evolving — leveraging third-party file solutions and lacking the advanced features,

cloud integration and ecosystem support required for the platform.

- **Limited hybrid cloud capability:** HPE traction in hybrid cloud integration is limited to the HPE Alletra Block Storage marketplace offering, with minimal traction or adoption beyond data protection requirements.

Huawei

Huawei is a Leader in this Magic Quadrant. Its FlashEver STaaS and OceanStor products, including the Dorado and Pacific series, are broadly focused on AI-ready storage services, cyber resilience and multicloud platform support. Its operations are geographically diversified in China, Latin America, Europe, and the Middle East and Africa, and its clients tend to be in large enterprise sectors, such as government, finance, carrier, information and communication technology (ICT) service, and manufacturing. Over the last year, Huawei made enhancements that include OceanStor Dorado V7 with storage area network (SAN) ransomware prevention and improved data mobility, OceanStor A800 for AI large-model workloads, and the introduction of 17 new SLAs. Huawei offers OceanStor SDS compatibility across AWS, Azure and Google Cloud Platform (GCP) through third parties, and a 99.99% SLA with HyperDetect AI.

Strengths

- **Comprehensive cyber resilience and security:** Huawei provides ransomware protection and data resiliency through a comprehensive six-layer data protection architecture. It incorporates active threat detection and SLAs for secure and reliable data recovery.
- **Strong hybrid cloud capability:** Huawei provides a unified management platform with multicloud integration. Policy-driven automation streamlines IT operations and governance across diverse environments.
- **Advanced AI management:** Huawei Data Management Engine Intelligent Quality (DME IQ) functions as a management platform equipped with AI for storage capabilities, risk mitigation and faster fault isolation.

Cautions

- **Challenging geopolitical perception:** Geopolitical trust factors present challenges to selection in key regions such as the U.S. and U.K., where there is heightened regulatory scrutiny.

- **Steep learning curve:** Some customer reviews highlight complex initial deployment and a steep learning curve. Products require substantial time and resources to become fully proficient in them.
- **Third-party reliance:** Due to U.S. sanctions, Huawei relies on third-party intermediaries to operate its controller software in major global hyperscale clouds. This introduces operational complexity, oversight challenges and potential support issues.

IBM

IBM is a Leader in this Magic Quadrant. Its product portfolio includes its FlashSystem block storage, IBM Storage Scale for unstructured data, and IBM Storage Ceph as a Service, which is fully managed on-premises. IBM Storage Scale offers a data catalog for unified metadata management and insights across heterogeneous unstructured data, both on-premises and in the cloud. IBM operates globally, serving large enterprise clients in financial services, government, technology and education. In the past year, IBM introduced the capacity-optimized QLC-based FlashSystem C200, inline ransomware threat detection AI models, policy-based data management enhancements, improved observability with Storage Insights, and AI-assisted workload placement and planning.

Strengths

- **Consistent hybrid cloud management:** IBM provides a single, policy-based data management architecture to manage data and applications across multidomain infrastructure. This reduces silos and enables consistent hybrid IT operations and application management.
- **Integrated cyber resilience:** Use of machine learning and integration with IBM Storage Defender to monitor the FlashSystem's in-line input/output (I/O) block data activity in real time provides more comprehensive coverage for early threat detection. It stretches across multiple layers to identify abnormal patterns, increase accuracy and filter out false positives.
- **Modularity and scalability:** The FlashSystem grid is designed for platform-native modularity, mobility and scalability, reducing platform complexity, which can foster faster IT innovation.

Cautions

- **Proprietary architecture:** IBM FlashSystem's storage controllers and media are tightly coupled, leading to less flexibility on-premises and more complex refresh cycles.
- **Setup and configuration complexity:** Some clients view IBM's setup and configuration process as complex and note a lack of clear documentation for less technically resourced businesses.
- **Incomplete STaaS portfolio:** IBM does not offer Storage Scale as a service, whereas other enterprise storage platform competitors provide a full portfolio of block, file and object STaaS solutions.

IEIT SYSTEMS

IEIT SYSTEMS is a Niche Player in this Magic Quadrant. Its product portfolio includes HFG7 Series, AS13000G7 Series and AS13000G7-IDFS software-defined storage. They focus on full data life cycle management, from generation to archiving and destruction, emphasizing AI-native storage, sustainability and energy efficiency. Its operations are mainly in China and Southeast Asia, with production in China, and large enterprise clients in education, banking, manufacturing and government. In the past year, IEIT SYSTEMS upgraded HF2000G7 to the Yuanpan Architecture, integrated the iTurbo 7.0 Intelligent Engine, and enhanced software-defined storage (SDS) with performance monitoring, intelligent QoS, file snapshot support and degraded drive detection.

Strengths

- **Reduced operational complexity:** The use of learning algorithms optimizes storage resource management tasks to free up I&O teams from dependency on specialized skills and time-consuming tasks.
- **Advanced cyber resilience:** IEIT SYSTEMS' solution uses advanced encryption capabilities to encrypt sensitive data before writing to disk, and it does so within an isolated recovery environment to protect it against cyberthreats.
- **Reliable performance:** Extensive use of QoS features provides workload management capabilities that prevent unexpected downtime and consistent application performance.

Cautions

- **Platform SLA gaps:** Limited transparency into IEIT SYSTEMS' new SLA roadmap, AI for storage initiatives and consumption-based services raises some clients' concerns as to

IEIT SYSTEMS' long-term plans for platform enhancements.

- **Limited market presence:** Primary focus on the Asia/Pacific (APAC) midmarket and small and midsize business (SMB) segments introduces potential uncertainty regarding suitability and support capabilities for larger global enterprise clients.
- **Limited ecosystem integration with major cloud providers:** Ecosystem support for major U.S. hyperscalers is less mature outside the Asia/Pacific region, which can lead to integration challenges and diminished functionality. These factors may affect the value and effectiveness of cloud investments.

NetApp

NetApp is a Leader in this Magic Quadrant. Its storage platform consists of a unified data plane (NetApp ONTAP) and a hybrid control plane (BlueXP). NetApp ONTAP is a single software stack for both structured and unstructured data, offering rich data management and multiprotocol support. It's available as hardware, STaaS and SDS on-premises, as well as on all major public clouds. NetApp operates globally, serving midsize to high-end enterprises across all verticals. Over the past year, NetApp launched seven new block-only ASA and six unified AFF storage systems, added Data Infrastructure Insights for SAN storage availability and performance, and enhanced ransomware detection with real-time threat analysis and immutable snapshots.

Strengths

- **Reliable, global operations:** NetApp has a track record of addressing a wide spectrum of storage workloads for all segments of the storage market. It has a large, global installed base.
- **Broad hybrid cloud offering:** NetApp offers block and file storage services in AWS and file storage services in Azure and GCP, both as self-managed deployments and storage as a service, using the same controller software as its on-premises appliances.
- **Comprehensive data management:** Beyond various snapshot-based replications and application consistent backups, NetApp offers advanced features, such as edge caching, ransomware detection, application-level protection, data classification and tiering, workload orchestration, and identity and access management.

Cautions

- **Limited platform support capabilities:** NetApp's platform support trails the Leaders evaluated in this Magic Quadrant in STaaS, centralized fleet management and SLA guarantees.
- **Legacy high-availability architecture:** NetApp's core architecture is based on high-availability pairs clustered together, rather than modern disaggregated scale-out architectures. As a result, NetApp systems have limited flexibility to expand performance and capacity independently.
- **Complex product:** Some NetApp AFF clients have expressed dissatisfaction over the complex initial setup and management interface, as well as limited documentation on advanced features.

Pure Storage

Pure Storage is a Leader in this Magic Quadrant. Its Evergreen//One enterprise data cloud platform is built on FlashArray for unified block and file storage and FlashBlade for unified file and object storage for unstructured workloads. It serves small to very large enterprises across all verticals, mainly in North America, Europe and select Asia/Pacific and Latin American countries. In the past year, Pure Storage launched FlashArray//XL R5 with next-generation controller technology and FlashArray//ST for ultra-high performance structured workloads and introduced FlashBlade//EXA for extreme-scale AI and HPC workloads. It also rolled out Pure Fusion v2.0 with AI Copilot for unified, policy-based fleet management across hybrid environments and enhanced its cyberstorage capabilities.

Strengths

- **High operational efficiency:** Pure Fusion provides policy-based automation and workload mobility, with an intelligent control plane for automation and self-optimizing performance. These features help to reduce manual effort and simplify administration, troubleshooting and overall operational effectiveness.
- **Unified data management:** Pure Storage's platform strategy unifies all data (block, file and object) into a single, virtualized pool of storage, which eliminates legacy silos, simplifies data access across hybrid environments and enables consistent data management.
- **Strong customer satisfaction:** Many customers consistently praise Pure Storage's support team for their responsiveness and professionalism. Evergreen support is viewed as a

benefit for future-proofing investments and enabling a portfolio of service-level agreements.

Cautions

- **High, ongoing cost:** Some clients label Pure Storage's product(s) as expensive due to significant costs for initial capex purchase and ongoing support and maintenance. Some users report that support fees can outweigh hardware costs over time, impacting total cost of ownership (TCO).
- **Lacks hybrid platform capabilities:** Pure Storage lacks FlashBlade unstructured data services in hybrid and public cloud environments, resulting in an inconsistent user experience.
- **Proprietary storage architecture:** Product storage controllers and media are tightly coupled, leading to less flexibility on-premises, and potentially higher hardware costs, as compared to those of leading-edge composable infrastructure.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

As this is a new Magic Quadrant, no vendors were added.

Dropped

As this is a new Magic Quadrant, no vendors were dropped.

Inclusion and Exclusion Criteria

Magic Quadrant Inclusion Criteria

To qualify for inclusion, providers must meet all following criteria and provide evidence, if requested, to support some or all of the claims henceforth:

- Vendors must offer block and either file or object storage services, each with an API-centric central control plane with integrated AI telemetry, capable of provisioning, orchestration and platform life cycle management in a nondisruptive operations manner.
    - A standardized common API catalog with the broader ecosystem of programmatic capabilities to interact with hybrid infrastructure and services to provide visibility and control for consistent data management and orchestration.
- Vendors must have a minimum total product and services revenue of $325 million (excluding support and maintenance), with at least 25% of total revenue coming from unstructured data product revenue. In addition, unstructured data product revenue must have a minimum year-over-year growth of 15%, as reported through 31 May 2025.
- Vendors must have a minimum of 500 active production block customers and a minimum of 200 active production file or object storage customers, with these services being generally available (GA) from 1 January 2025. New features and capabilities must be generally available by 31 May 2025.
    - Each active customer must have a minimum of 100TB of raw block storage and 500TB of raw file or object storage.
- Vendors must support active customers in three of five major geography regions (e.g., North America; Europe, the Middle East and Africa; Asia/Pacific [APAC]; Japan; and Latin America). In addition, vendors must include at least 25 customers of block and either file or object for each major geography region supported.
- Vendors must support a minimum of five of seven use cases, with mandatory support for online transaction processing (OLTP), container management and virtualization platforms. Vendors must show evidence for customers deployed across at least five out of seven use cases. The use cases are as follows:
    - Online transaction processing
    - Virtualization and container management platforms
    - High-performance file
    - Object-native applications

    - Hybrid platform services
    - Hybrid cloud storage
    - Artificial intelligence
- Vendors must own (not manufacturer), and develop the core storage operating system, including the block store and file or object system.
- Vendors must offer a minimum of two integrated, managed and supported data storage services — either organic or partner-branded — for backup or disaster recovery (DR), cybersecurity, archive or database-related services.
- Vendors must offer data management capabilities between on-premises and at least one of these top two public clouds by global revenue: AWS or Azure.
- Vendors must offer block and either file or object as a storage service (STaaS).

Magic Quadrant Exclusion Criteria

- ESP primary storage SDS options are excluded from this market if:SDS is part of a hyperconverged infrastructure (HCI) solution or if the storage software is not available for on-premises usage.
- Public cloud storage services offered by infrastructure as a service (IaaS) or platform as a service (PaaS) providers are excluded, including those provided by cloud service providers (CSP) that integrate and offer your core product intellectual property.

Evaluation Criteria

Ability to Execute

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	*Weighting*
Product or Service	High
Overall Viability	Medium

Evaluation Criteria	*Weighting*
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	High
Customer Experience	High
Operations	Medium

Source: Gartner (September 2025)

Completeness of Vision

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	*Weighting*
Market Understanding	High
Marketing Strategy	High
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium

Evaluation Criteria	*Weighting*
Innovation	High

Source: Gartner (September 2025)

Quadrant Descriptions

Leaders

Vendors in the Leaders quadrant have the highest composite scores for their Ability to Execute and Completeness of Vision. A Leader has broad market share across major geographies, brand awareness, financial performance and enterprise credibility. Leaders ar market-driven — they envision the market over time, and make the long-term investments needed to drive platform-native outcomes, technologies, capabilities and ecosystem partnerships. These vendors demonstrate a clear understanding of enterprise storage platform market needs and how product features, combined with platform business model innovation, transform and modernize IT operations. Leaders are innovators and thought leaders, with well-articulated plans that customers and prospects can depend on for their platform infrastructures and strategies.

Challengers

Vendors in the Challengers quadrant participate in the broad enterprise storage market and execute well enough to be a serious threat to vendors in the Leaders quadrant. Challengers have enterprise-class storage product features with which to compete, but lag behind Leaders in platform business model or technological innovation. Challengers have not yet demonstrated long-term and consistent investments in leading-edge platform-enabled product capabilities, as well as business model, marketing and sales strategies needed to enable and support the transition to a platform-native service provider.

Visionaries

Vendors in the Visionaries quadrant are providing leading market-driven infrastructure platform features and innovative platform capabilities across the spectrum of the hybrid IT operations platform stack offerings to address operationally or financially important end-user demands. Visionaries are recognized by enterprise storage clients and peers for their

ability to continuously demonstrate compelling thought leadership and an innovative view of the future for modern IT operations, often introducing disruptive platform initiatives, supporting technologies or approaches. However, they have not yet demonstrated the ability to capture meaningful platform market share through market-driven sales and marketing initiatives that underpin concrete commercial traction.

Niche Players

Vendors in the Niche Players quadrant are often narrowly focused on specific geographical markets, vertical industry segments or limited use cases. This quadrant may also include vendors that are ramping up their product and platform offerings, or larger vendors that are having difficulty developing and executing on their vision against new platform market demands.

Context

This Magic Quadrant represents vendors offering platform-native services and multiprotocol storage arrays — either HDD hybrid or solid-state arrays (SSAs), or SDS solutions, developed internally. When choosing an enterprise storage platform (ESP), heads of I&O must consider:

- Platform-native services for hybrid cloud investments
- Integration with public and hybrid clouds for hybrid platform capabilities that stretch beyond on-premises
- The ability to integrate third-party independent software vendor (ISV) products and services and to provide as a platform service
- Use of a control plane for platform orchestration, provisioning and lifetime platform technology management in conjunction with workload demands
- Ease of management and continuous improvement in productivity and efficiencies, using AIOps to enhance IT operations
- Use of automation technologies, including AIOps and agentic AI domain systems, and methodologies to drive platform-based IT outcomes
- A comprehensive set of data services, such as backup, disaster recovery, archive and cyber resilience, to enhance IT operations

Heads of I&O must also ensure that ESP capabilities are acquired at the right price points using industry benchmarks, while choosing the appropriate acquisition model — capex or as-a-service consumption (operating expenditure [opex]) for the organization. Preference should be given to vendors that provide written SLA assurances and/or guarantees as to IT operating model outcomes, such as productivity and storage asset management, continuous optimization, rapid innovation through platform ecosystem ISV curation, and cyber resilience. Furthermore, those that have a competent partner network should also be given preference; this will ensure that solution design, installation and managed services are flawless, and that support is integrated with the use of AIOps tools.

Internally, heads of I&O must work with application owners to align IT priorities and outcomes to business demands. The ESP market is shifting from traditional IT budgeting processes and capex sourcing to platform-native service consumption, which includes metrics-based IT operating model SLA sourcing. Heads of I&O must reexamine their long-term infrastructure platform requirements through this lens and choose a vendor- and partner-based approach that effectively aligns ESP solutions with desired IT operating model outcomes. The storage industry is undergoing a significant transformation unlike anything before this time, so it's critically important that heads of I&O develop an improved and extensible hybrid platform strategy that will guide this period of transformation.

Market Overview

The ESP market emerged at the convergence of two major trends: the adoption of the hybrid cloud operating model for on-premises mission-critical applications and the consolidation of two markets (primary storage platforms, and file and object storage platforms) into one market. This consolidation is in response to heads of I&O looking to simplify storage vendor management, drive cost synergies and reduce sourcing complexity by unifying multiprotocol access systems.

ESP platform-native consumption services will power the next decade of infrastructure storage strategies that will pave the way for a more productive, resilient and sustainable platform in the data-intensive digital economy. Vendors assessed in this Magic Quadrant possess the technologies, business model, financial means and enterprise credibility to service platform demands.

Heads of I&O responsible for hybrid platform data services infrastructure are changing how they source, finance, and manage their storage assets and the data estate environment. The evolution is pushing storage demands toward SLA-based platform-native services outcomes, software-defined technologies, integrated value-add data services and an API-first mindset delivered through a modern platform ecosystem of as-a-service partners. CIOs are modernizing their IT operating model, shifting it away from a traditional service provider and into a business-aligned, outcomes-focused organization. CIOs must become reinvention-ready, allowing their enterprise to adopt and adapt to rapid technological and market changes so they can unlock advanced intelligence, industry-specific cloud innovations, enterprise efficiency and agility, and integrate new technologies (e.g., AI-enabled decision making).

This Magic Quadrant gives heads of I&O insight into modern storage platform initiatives, methods and storage vendor investments that are enabling rapid assimilation of changes in the IT infrastructure and operations landscape. It provides an overarching plan and a timeline to drive innovation and derisk those factors that may disrupt IT operations. It also offers guidance on how to enhance IT outcomes in a favorable context, commensurate with the rise in hybrid cloud in the digital data services era. Modern storage platforms are pivotal in driving I&O strategies that support priorities around agility, resilience, security and business value creation.

The transition for IT operations moves beyond traditional storage practices that involve acquiring discrete solutions and technical features for various workloads. These methods are inadequate in the face of escalating data volumes and changing business landscapes that require a foundation for rapid and agile innovation. Market forces propelling digital transformation and a hybrid cloud environment demand the disruption of long-standing operational paradigms and legacy infrastructure dogma, forcing heads of I&O to adopt new storage platform technologies and operating methods.

Now is the time to chart a bold, new course and harness rapid innovation techniques that deliver tangible, strategic value to the organization. In the coming years, heads of I&O will rethink IT operations' methods as they focus their efforts on accelerating rapid innovation while aggressively tackling stubborn infrastructure costs. They appreciate the wholesale benefits of the on-premises cloud operating platform model as a replacement for inefficient capex financing and budgeting processes but will take the bigger step to migrate to platform-native consumption services. They will adopt software-defined infrastructure methods and automation initiatives to become more agile and relieve administration costs

and overhead burdens. In summary, they will need to shift some management responsibilities and cost containment to platform vendors, which are making the investments in AI telemetry and autonomous storage.

⊕ Evidence

⊕ Evaluation Criteria Definitions