Enterprise Storage Group

Storage Intelligence for the Internet Age.

Business Brief - November 2001
The End Of An Era – Moshe Moves On

What?

EMC has been a blessed company. From nothing to king in relatively short order, EMC has become the most dominant force in all of the storage industry. Besides founder Dick Egan and growth guru Mike Ruettgers, the person most responsible for architecting the single most successful product in subsystem history (Symmetrix) has been Moshe Yanai.

What's The Deal?

Moshe is responsible for the engineering behind Symmetrix, and most of the original software that drove the product into the stratosphere. Symmetrix's success is clearly the envy of the industry. So, why the big deal? As a smart man once said, sometimes the thing that makes a zealot successful eventually causes their undoing.

Most of the industry watchers agree that times are different then they were even a year ago. The day of the big box owning all the value is gone – the new frontier is software, and more importantly, software that doesn't execute exclusively on Symmetrix or any other specific box.

It's hard enough to make a transition from hardware to software, but it's all but impossible if you need to make the move fighting the king. We figured it was a matter of time for Moshe to leave, and rumors have been flying for months.

The Bottom Line

Joe Tucci is the new kid in charge, and he has the unenviable job of taking the most successful company in the space and turning it into a whole new direction. This won't be easy, and it isn't that Tucci decided this in a vacuum – this is the only course of action in our opinion.

Moshe has the reputation of being a brilliant, single-minded "my way or the highway" kind of guy. That works great when that way is the way of the company, and doesn't work for long when it isn't. That's where we are.

The bottom line is Moshe has nothing left to prove. He was able to accomplish what few in history have ever been able to equal. There is nowhere to go but down, so why fight the fight? EMC needs to retool, keeping all the things that made is successful and redirecting that energy into a whole new world where software is truly king. Can they do it? It will be brutal, and there are few successful precedents, but if anyone can, it's EMC.

We suspect Moshe has too much left to give to take himself out of the game for long, and think he may resurface with another start-up potentially. For the time being, Moshe stays on as an EMC fellow, advising the company on technology issues. All of the people that ran the engineering groups under Moshe are still there and most have now been elevated.