

FROST & SULLIVAN

NETAPP

2022
TECHNOLOGY
INNOVATION
LEADER

GLOBAL HEALTHCARE
CLOUD INDUSTRY

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each Award category before determining the final Award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. NetApp excels in many of the criteria in the healthcare cloud space.

AWARD CRITERIA	
<i>Technology Leverage</i>	<i>Business Impact</i>
Commitment to Innovation	Financial Performance
Commitment to Creativity	Customer Acquisition
Stage Gate Efficiency	Operational Efficiency
Commercialization Success	Growth Potential
Application Diversity	Human Capital

Deep Experience and an Innovative Mindset Bring Industry-leading Solution

Today, the data landscape across the healthcare and life sciences space constantly evolves and becomes more and more complex and interconnected, facing various challenges such as data extraction, privacy, and security. Leading healthcare and life sciences organizations worldwide increasingly adopt strategies to manage their data efficiently, eliminate information silos, optimize resources, reduce data center footprints, and leverage artificial intelligence (AI) to drive actionable insights.

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**- Pavel Zhebrouski,
Best Practices Research Analyst**

Founded in 1992 and headquartered in San Jose, California, NetApp is a global leading platform-as-a-service healthcare cloud services provider. By leveraging its extensive experience, Frost & Sullivan analysts appreciate how the company’s complete cloud solutions portfolio accelerates innovation, all while unlocking the potential of the cloud and improving data protection.

NetApp delivers industry-leading data management and storage solutions on AWS, Azure, and Google Cloud. The company helps customers better manage, protect, move, and store their data while remaining agnostic about the data location: on-premises, private cloud, public cloud, hybrid cloud, or a multi-cloud environment.

Cloud Volumes ONTAP®

NetApp understands that healthcare and life sciences customers find themselves dealing with multiple clouds and on-premises data centers. When existing in a hybrid multi-cloud environment, optimizing myriad workloads and collaborations requires flexibility and consistency in data movement.

As such, the company focuses on data flexibility, as data fabric seamlessly allows movement from one cloud to another. Notably, a data fabric powered by NetApp enables seamless, consistent data access at any place it resides. The company introduced its powerful Cloud Volumes ONTAP® data management software to achieve this value.

ONTAP® runs everywhere and delivers performance and functionality across a hybrid multi-cloud estate. The tool provides enterprise-grade storage with unparalleled control and management over cloud storage assets, reduces costs, and ensures optimized resources (cutting up to 90% of storage costs). Furthermore, ONTAP® ensures an unrivaled level of security and compliance, keeps data secure and private at any location, and provides a resilient architecture to solve data loss and downtime problems before they occur.¹

Data Protection and Security Assessment®

NetApp continues its industry-leading performance while understanding that fast recovery from ransomware attacks and preventing disruptions for the workflow are quite essential for the healthcare space. Its solutions enable customers to avoid costly, time-consuming, and resource-intensive restoration processes (as backup, archive, and disaster recovery are all ideal for the cloud).

Specifically, NetApp Data Protection and Security Assessment® provides immediate valuable insight and helps users improve their ransomware and data protection strategies. Its detection and prevention solutions include warning and security mechanisms to avert as many threats as possible. The tools also create actionable plans to remediate exposure and supply valuable insights about threats, recovery from an attack, and compliance to avoid future risks.²

Cloud Insights® and Active IQ®

NetApp Cloud Insights® and NetApp Active IQ® proactively provide customers with information regarding file changes and resource consumption to quickly alert them about potential risks and breaches. NetApp Active IQ® uses AI applied to the product based on-premises or in the cloud, ensuring reduced risks. It collects around 250 billion data point a month, allows partners to monitor what is happening in the customer environment, and simplifies proactive care for possible issues. NetApp Active IQ® is a powerful tool to share knowledge with customers and bring them closer to solutions developers while cutting the customer request tickets to a minimum.

SnapMirror®, SnapLock®, and Snapcenter®

ONTAP® leverages SnapMirror®, NetApp's industry-leading replication technology, to replicate on-premises data to the cloud, making it simple to have secondary copies available for multiple use cases.

¹ <https://cloud.netapp.com/ontap-cloud>, accessed February 2022

² NetApp ransomware solutions for healthcare, <https://www.netapp.com/pdf.html?item=/media/32651-SB-4090-1020-Ransomware-in-Healthcare.pdf>, accessed February 2022

As a result, NetApp SnapLock® and SnapCenter® solutions allow users to back up and restore at nearly any point.

Frost & Sullivan commends NetApp for its innovative mindset, ongoing excellence, as well as its leadership role in setting new market trends that address unmet customer needs. The company is in the proper position to lead the healthcare cloud space as it brings its unique solutions to the market - all while unlocking the true potential of cloud and data.

The Value behind the Customer-centric Philosophy

Apart from its considerable expertise and innovative solutions, NetApp leverages a customer-centric philosophy, with the customer at the heart of everything the company does. A vital part of its strategy is building solid and cooperative relationships with the payers, healthcare providers, and life sciences companies to collect their feedback and address the challenges they experience. Specifically, it runs a dedicated customers' panel talking with CEOs to evaluate potential improvements. Solutions'

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functionality responds to the real needs of end-users. Moreover, the company remains informed of customers' digital transformation needs, sharing best practices through its NetApp Community, and drives industry-wide innovations for broader customer success.

NetApp's value-based performance makes it the partner of choice for industry leaders. Notably, the company supports AstraZeneca in speeding the discovery process for life-saving treatments. AstraZeneca drives its digital transformation

with NetApp's cloud services. It admits excellent collaboration results, e.g., smarter data usage, the faster discovery of magic molecules, and more life-changing treatments for patients.³ Another successful case study comes from Blue Cross Blue Shield. The US health insurance giant provides insurance to more than 106 million people in the US. Blue Cross Blue Shield noted NetApp's ONTAP® helped it seamlessly integrate on-premise and cloud data, manage all systems within a single cloud manager, achieve new speeds in health care application development, and leverage the hybrid environment.⁴

"NetApp allows us to be very, very seamless from a foundational perspective. If you are an application developer leveraging DevOps, it is no longer I want it in the cloud, or I want it on-prem – It is now the Blue Cross cloud, and it does not matter where the workload resides, and it depends on what services you require, and we are able to provide those."

- Petar Bojovic,

Director of IT Infrastructure at Blue Cross Blue Shield of North Carolina⁵

³ <https://www.netapp.com/customers/astrazeneca-data-fabric-case-study/>, accessed February 2022

⁴ https://cloud.netapp.com/success-story-blue-cross-blue-shield?_hstc=98807244.e59cb889cf11e2b07508d84ec1903a76.1602055670781.1611331430167.1613033424755.16&_hssc=98807244.1.1613033424755&_hsfp=341009518, accessed February 2022

⁵ <https://cloud.netapp.com/solutions/healthcare-life-sciences>, accessed February 2022

In addition, NetApp ONTAP® data management software supports Tucson Medical Center in keeping pace with its growing electronic health record data and maximizing its availability. The technology has been an instrumental tool in virtualizing 98% of the healthcare organization's more than 700 applications. In addition, it allows Tucson Medical Center to support its 1,300 users concurrently.⁶

NetApp effectively supports McKesson, America's leading healthcare company. Leveraging a public cloud powered by NetApp® Cloud Volumes ONTAP® and NetApp AFF® McKesson gets the power to drive modern healthcare applications.⁷

Another powerful example of great value behind NetApp's solution comes from eHealth New South Wales; the organization seamlessly migrated its enterprise image repository to Amazon FSx for NetApp ONTAP®. With Amazon FSx for NetApp ONTAP®, eHealth New South Wales achieved the availability and scalability its EIR requires while reducing operational overhead.⁸

Today, Epic software is the industry standard for hospital records generating massive data volumes; these volumes are both difficult and expensive to manage. To reduce costs and improve care, Cone Health, a North Carolina-based healthcare system, is using Epic on Azure powered by NetApp. As a result, Cone Health is saving millions of dollars on its disaster recovery infrastructure for EMR without sacrificing availability or performance.⁹

To strengthen its reputable brand and educate the market on the benefits of innovative solutions, the company focuses on strategic communication with partners and customers while actively running various market initiatives to become an essential voice of the industry. Notably, NetApp actively participates in the leading industry events while being among the key members across the numerous industry associations.

With a remarkable can-do attitude, the company is well-positioned for the current and upcoming trends in the healthcare industry. It faces even the most pressing challenges in the market while providing innovative solutions with compliance with international standards. The company's commitment to driving digital transformation with cloud technologies is the cornerstone of its outstanding operations, consistently achieving superior performance. Frost & Sullivan agrees that NetApp's successful operation history further strengthens its credibility and demonstrates its wealth of experience.

⁶ <https://www.netapp.com/customers/tucson-medical-center-ontap-case-study/>, accessed February 2022

⁷ <https://www.netapp.com/pdf.html?item=/media/28323-cs-McKesson.pdf>, accessed February 2022

⁸ <https://aws.amazon.com/fsx/netapp-ontap/customers/#ehealth>, accessed February 2022

⁹ <https://www.netapp.com/customers/cone-health-data-management/>, accessed February 2022

Conclusion

Today's data landscape across the healthcare and life sciences space constantly evolves and becomes more and more complex and interconnected. Frost & Sullivan monitors the growing demands for simplifying data architecture, improving data mobility, lowering cloud costs, increasing data protection, and streamlining data management.

Leveraging its deep experience, NetApp provides a complete portfolio of cloud solutions that accelerates innovation while unlocking the potential of the cloud and improving data protection - regardless of the data location. Its unique solutions enable customers to optimize the cloud compute costs and performance and enhance data protection, security, and compliance. Through its customer-centered and data-centric approach, NetApp brings clear value for payers, healthcare providers, and life sciences companies while ensuring the best outcomes.

With its commitment to innovation and strong overall performance, NetApp earns the 2022 Frost & Sullivan Global Technology Innovation Leadership Award.

What You Need to Know about the Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation Leadership Award recognizes the company that has introduced the best underlying technology for achieving remarkable product and customer success while driving future business value.

Best Practices Award Analysis

For the Technology Innovation Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization Success: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall financial performance is achieved in terms of revenues, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Commitment to quality and to customers characterize the company culture, which in turn enhances employee morale and retention

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

[Learn more.](#)

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

