Sustainability Takes Center Stage at NetApp 2023 EMEA Industry Analyst Strategy Summit

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IDC's Quick Take

NetApp hosted its 2023 EMEA Industry Analyst Strategy Summit in Windsor, the U.K., September 7. During the event, NetApp executives discussed their strategy, product road map, and sustainability technologies, among other topics. This IDC link is exclusively focused on their sustainability strategy.

Event Highlights

NetApp 2023 EMEA Industry Analyst Strategy Summit was an invitation-only event for select industry analysts from across EMEA. The event was hosted at the vendor's U.K. headquarters, in Windsor, and could be attended both onsite and online, as many of the analysts are based outside the U.K.

The Summit provided on-stage presentations by the executive team, including Giovanna Sangiorgi, SVP & GM, EMEA & LATAM; Piero Gallucci, VP & GM, UK&I; and Kristian Kerr, VP, EMEA & LATAM Partner Organisation. Other sessions featured NetApp's go-to-market strategies with channel partners, including Computacenter and Fujitsu, and customers at UZ Leuven Hospital and TAG Heuer Porsche Formula E Team.

Its sustainability session was presented by Chief Evangelist Matt Watts. Rather than focusing on NetApp's own organizational ESG strategy, Matt took an outward view and provided a deep dive into NetApp's product portfolio and capabilities aimed at supporting customers with their sustainability requirements.

Essentially, [NetApp's solution portfolio to support ESG requirements](#) is threefold:

- NetApp has designed many of its solutions with **energy-efficient technologies in mind**, allowing customers to reduce their carbon footprints.
- Some solutions provide **data insights** and help companies monitor, manage, and optimize their carbon footprints across their hybrid and multicloud environments.
- In relation to their **energy efficient solutions**, NetApp has a suite of products for automating and optimizing data storage infrastructure, which in turn reduces carbon emissions.

NetApp provides an efficiency guarantee of 4:1 for SAN workloads, including ONTAP flash systems, for which less rack space is required through deduplication, compression, and compaction.

NetApp's Titanium-rated power supplies for storage equipment are 90% efficient, meeting the requirements set by EU regulation 2019/424, which comes into force in January 2024.

The vendor's Cloud Tiering solution moves data storage that is not frequently used or is unused — which NetApp estimates can represent as much as 60% of a customer's total data estate — to public clouds. Cloud Tiering can reduce the amount of raw storage required, impacting carbon emissions.

NetApp is an advocate of flash-based storage to support customers' sustainability goals. The company notes that, in contrast to a hard disk drive (HDD), a solid-state drive (SSD) supports more input/output operations per second (IOPS) per watt of electricity. From a circularity standpoint, NetApp says flash storage devices can be more resilient during their full life cycle, needing less maintenance and fewer replacement parts.

NetApp helps customers track, manage, and reduce data storage carbon emissions through **data insight** tools: NetApp's **Cloud Insights Dashboard** reports on power consumption and thermal and carbon information for ONTAP storage across cloud and on-premises environments; however, a more holistic solution is provided by its **BlueXP** sustainability dashboard, which brings customers' storage and data services from across all their hardware into a unified control pane. Data insights are followed with recommendations so that customers can move data workloads for cost and carbon efficiencies. The dashboard also includes automated management workflows. NetApp's **BlueXP Classification** maps and classifies data, such as personally identifiable information (PIIs) and unused data, so that customers can manage storage costs and carbon footprints.

In partnership with Massachusetts Institute of Technology's consortium, Product Attribute Impact Algorithm (PAIA), NetApp can provide a life cycle analysis (LCA) of its hardware carbon emissions, including by region.

In addition to its energy efficiency technology and carbon insight tools, NetApp has advanced ewaste and product take-back programs, with 99% of its end-of-life products recycled, resold, or returned to service. The company manages the post-operational handling of its ewaste (e.g., equipment is labelled, inspected, tested, and tracked in a database) and complies with the EU's Waste Electrical and Electronic Equipment Directive (WEEE Directive).

NetApp's ESG strategy and ESG leadership have been recognized by EcoVadis; the vendor has reported GHG emissions data to CDP for over a decade. Its Scope 3 emissions, which currently represent 95% of its carbon footprint, will reach a 50% intensity reduction both upstream and downstream (e.g., through customer transitions to the cloud) by 2030. Furthermore, NetApp is a founding member of the Environmental Protection Agency's ENERGY STAR program for datacenter storage.

IDC's Point of View

According to IDC's recent *CEO Sentiment Survey*, ESG requirements are CEOs' top business risk in EMEA. To deal with this, IT departments hold the largest ESG budget in their organizations for managing sustainability impacts. Cloud computing is a key target area to this end. The Internal Energy Agency (IEA) estimates that datacenters and data transmission networks accounted for 0.9% of energy-related GHG emissions in 2020 and advises organizations to halve carbon emissions by 2030 to align with the Net Zero Emission (NZE) Scenario.

NetApp is addressing IEA's recommendations with a broad portfolio of sustainable solutions, but its marketing approach is not limited purely to an environmental narrative. The company follows the Triple

[Bottom Line framework](#) — People (the customers it serves), Planet (its carbon insight tools and energy efficient data storage solutions), and Profit (cost savings resulting from energy efficiencies). This triple bottom-line approach is much needed for sustainability products, which often lack financial benefits or models to quantify them, as it gives them credibility and enables momentum and market expansion. Indeed, this approach helps build the business case for stakeholder buy-in within organizations.

NettApp's marketing approach essentially reveals an advanced sustainability strategy. Unlike many IT vendors still resolving and defining their own ESG strategies, NetApp is one step ahead and makes available storage solutions that support customers with their ESG strategies. In truth, storage shouldn't be underestimated in the full mix of computing power required in datacenters, and NetApp is right to point out that companies are creating a landfill of data, with environmental and monetary implications, unless it's properly handled.

NetApp's sustainability portfolio is more complete than standard green IT offerings, which often only focus on energy efficiency equipment. Indeed, its data insights tools provide intelligence to IT departments, enabling them to monitor, quantify, and efficiently manage unnecessary and unwanted data in their IT estates.

Furthermore, with the European [CSRD](#) regulation coming into effect in January 2024, NetApp's insights tools will be much needed. IDC surveys show that about four in five companies are in the early stages of gathering ESG data — among many reasons, due to limited visibility across their value chains. NetApp is certainly well on the way to supporting customers with reporting and compliance requirements.

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