2010-11 Unix Survey: IBM Leads in Technology, Roadmap

A major part of the **2010-11 GCG Unix Vendor Preference Survey** is the Vendor Face-Off section. This is where we ask real-world data center personnel to rate the major Unix system vendors (HP, IBM and Oracle) on a wide variety of technical, vendor support, and customer satisfaction criteria. We captured the views of 306 enterprise IT managers in this edition of the survey.
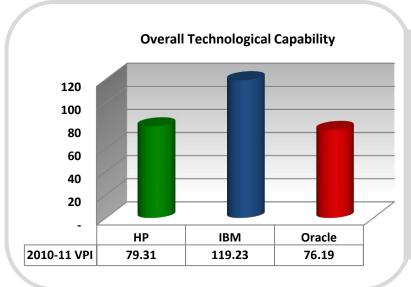
Vendors are rated in terms of their VPI score – a simple normalization technique we use to ensure that results aren't skewed. (For more details on the survey and methodology, click here.) In simple terms, a VPI score of 100 is 'par'. Scores above 100 are good, and scores less than 100 – well, they're not so good.

It's also important to point out that there isn't an overall 'winner' or 'loser' in these surveys. We ask many questions and cover a wide range of topics, some of which are more important to particular customers than to others. For example, some customers would value manageability more highly than performance, while others want high availability most of all.

The Vendor Face-Off section of the survey highlights just how competitive the commercial Unix market is these days. Vendors are pushing hard to differentiate their offerings against each other, but also against x86 systems. With Unix systems, the vendors have control of the hardware, o/s, and middleware parts of the stack and can integrate them in ways that offer higher availability, easier manageability, and great performance.
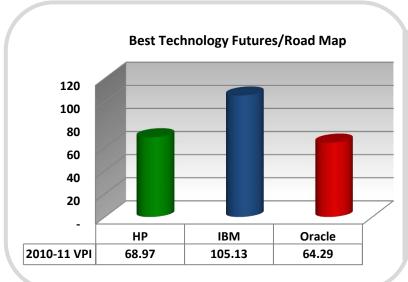
In this section of the survey, we're asking customers to tell us which vendors are doing the best job on a given category, which are falling behind, or if they simply don't see any difference.

Innovation, roadmaps, and technological capabilities are important topics because so much of the commercial Unix value proposition – and justification for higher margins – is based on custom technology and the benefits it pays to customers adopting it….

Overall Technological Capability

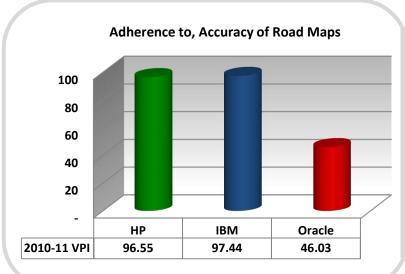|	HP	IBM	Oracle
2010-11 VPI	79.31	119.23	76.19

IBM has held the technological high ground in terms of overall capability for the last five years. Their last two wins were with larger margins than ever before, meaning that customers perceive a growing gap between IBM and its competitors in terms of R&D and the ability to move IT advances from the lab to customer data centers.

Oracle and HP are essentially tied, which has been the pattern over the last five years. This situation isn't healthy for either vendor; innovation drives the commercial Unix market.

Best Technology Futures/Road Map

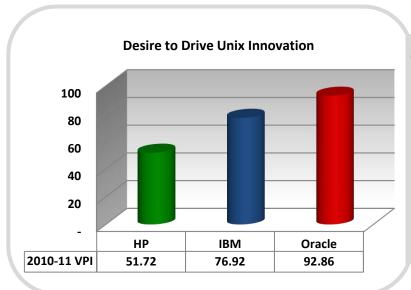|	HP	IBM	Oracle
2010-11 VPI	68.97	105.13	64.29

IBM is also seen as having the best commercial Unix road map vs. HP or Oracle. This is yet another category that IBM has led for the past five years.

The result this year is the most lopsided we've seen to date, with IBM topping both competitors by around 40 points. However, we did see a significant number of respondents (~17%) answer 'Not Sure' on this question, meaning that perhaps the vendors aren't doing a great job of communicating their future plans to their customer bases.

Adherence to, Accuracy of Road Maps

	HP	IBM	Oracle
2010-11 VPI	96.55	97.44	46.03

IBM and HP get top marks for actually hitting their road map goals on time. This has historically been a strong category for IBM, but problematic for HP. Customers have penalized HP year after year for Itanium delays, while rewarding IBM for generally delivering without significant slips.

Oracle's scores have dropped like a rock over the past two years. Their VPI score of 46 barely tops their record low score of 44 last year. However, this result might not be as bad as it looks – about 25% answered "Not Sure" or "No Difference" on this question.

Desire to Drive Unix Innovation

	HP	IBM	Oracle
2010-11 VPI	51.72	76.92	92.86

Customers believe that Oracle has the greatest desire to drive Unix technology forward. Sun used to own this category in previous surveys, so it's not surprising to see Oracle win here this year.

There's always been a perception that Sun/Oracle is the 'pure play' in commercial Unix, and that HP is more interested in x86 and ink, while IBM wants to put everyone on a mainframe. This perception seems to be still holding sway.

Customers give IBM a lot of credit and mindshare for their considerable R&D investments and how well the company executes on their road map promises. Today, IBM is the only vendor that totally controls their Unix line from top to bottom. (HP uses Intel Itanium chips, and Oracle relies on Fujitsu for high-end systems.) We believe that this has helped IBM push innovation farther and faster than their closest competitors, which has resulted in IBM moving from third to first in Unix system sales.

HP and Oracle need to pay close attention to customer perceptions on these topics. Innovation and what it delivers (performance, uptime, manageability, TCO) are the only way that commercial Unix vendors can compete against each other and the ever-rising tide of x86 systems.

While Unix systems are seen as the scalable, mission critical platform of choice for most organizations, x86-based platforms are definitely making inroads and winning deals that used to be slam dunks for commercial Unix.

If you're interested in seeing other results or finding out more about this survey (demographics, expanded results, detailed GCG analysis), click here.

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