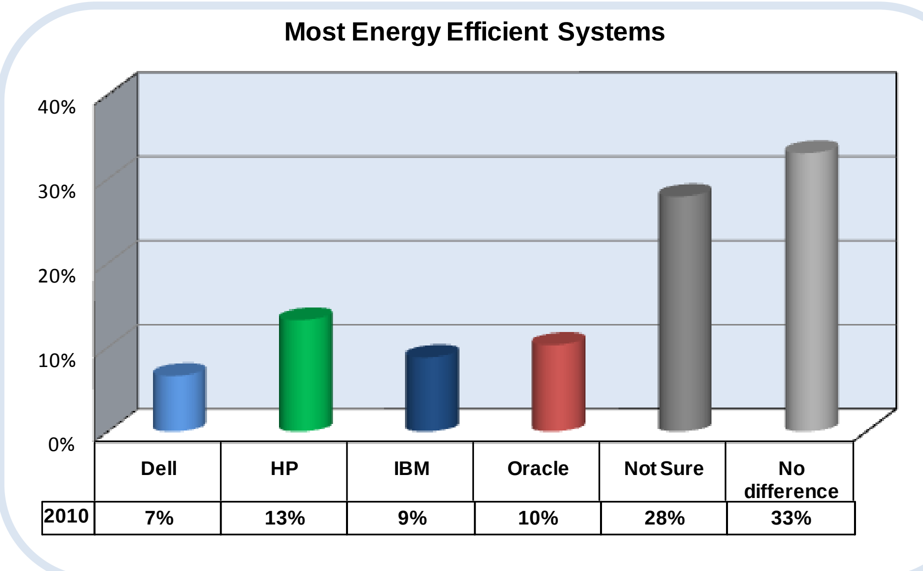
Gabriel
CONSULTING GROUP

Power, Cooling and Floor Space in x86: Who's in the Lead?

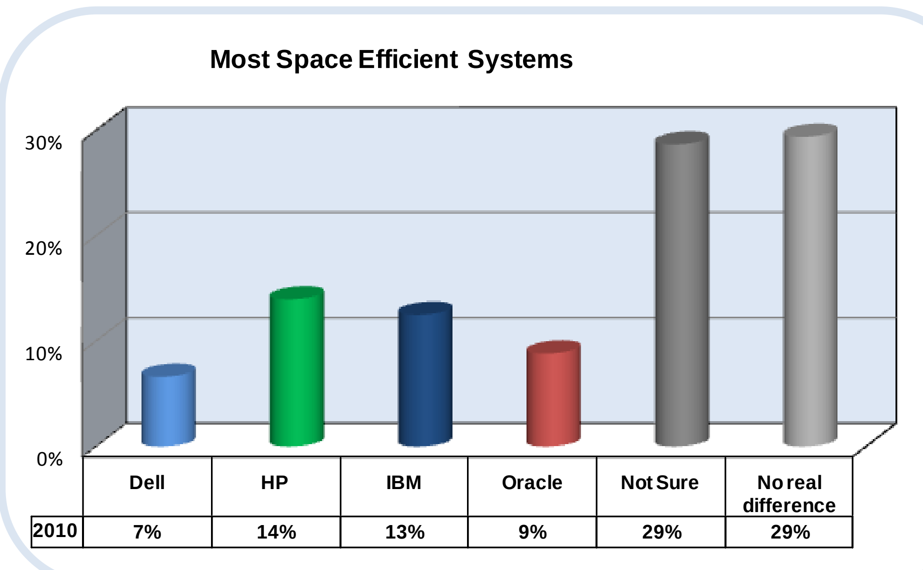
As part of our **2010 x86 Server Vendor Preference** survey, we asked customers whether they're facing facilities challenges -– and to what degree these factors play into their system decisions. We've consistently had a significant number of customers (details here) tell us that these issues weigh heavily in their decision-making process and will play an even bigger role in the future. We also have found that the majority of IT shops are now financially responsible for their facilities usage, giving them an even greater incentive to become more efficient (report here).

With these trends firmly in mind, every vendor has made a major play to convince customers that their offerings are best at reducing power, heat, and footprint requirements. So has anyone made any progress? Have any of the major vendors staked out a greener-than-green rep for themselves? Let's find out...



Customers really don't see a clear leader in terms of system energy efficiency. The biggest 'winner' in this category is "No difference between vendors," which has almost 3x more votes than HP (the highest-scoring vendor). In fact, "No Difference" plus "Not Sure" comprises 61% of the overall total.

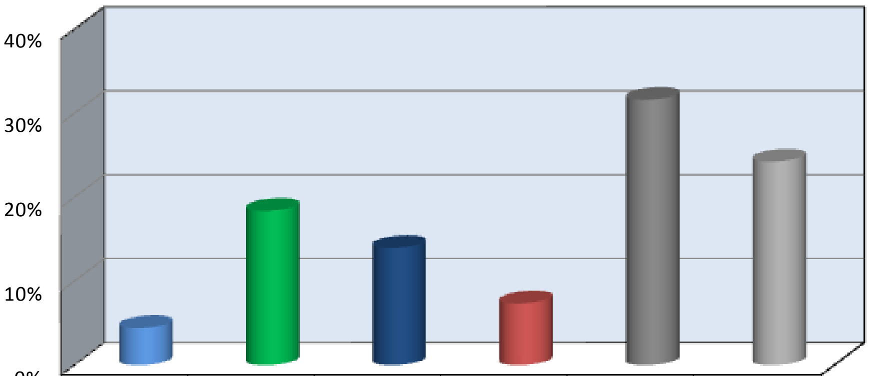
In past surveys, customers were significantly more decisive on this topic. In 2009, 39% were in the "No Difference" and "Not Sure" camps. In 2007, only 27% of customers felt this way.



Just as with energy efficiency (above), customers don't see a leader when it comes to system density.

Close to 60% of our respondents said either that there's no difference in vendor offerings or that they don't know which vendor can jam the most systems into the smallest space.

Best Power Monitoring/Management Solution



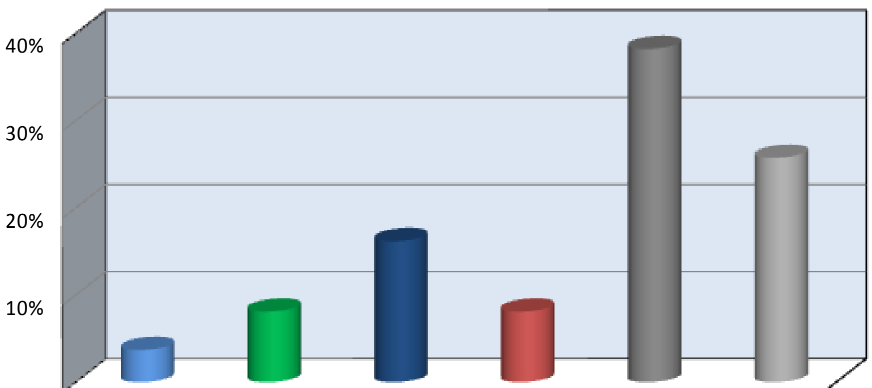
	Dell	HP	IBM	Oracle	Not Sure	No real difference
2010	4%	18%	14%	7%	32%	24%

Power monitoring and management is important. For customers who need or want to control their energy usage, it's indispensable.

And yet customers don't see much difference (or don't know the difference) between the major vendors on this topic.

Every vendor has their own unique power management offering, but none of them has shown the ability to step up and grab the high ground on this feature.

Best Data Center Design/Advisory Service

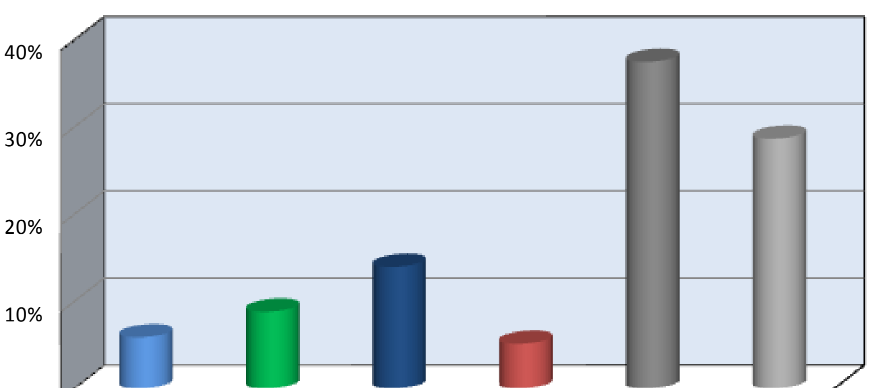


	Dell	HP	IBM	Oracle	Not Sure	No real difference
2010	4%	8%	16%	8%	38%	26%

All of the vendors on our survey list are offering some level of data center design service, or at least offering up their advice on how to best house IT operations. All of the vendors are looking to engage with large data centers, but most also have services for smaller shops.

However, these efforts haven't had much of an impact on real-world customers; the "No Difference" and "Not Sure" answers dwarf any of the results for the individual vendors.

Vendor best able to increase IT facility efficiency



	Dell	HP	IBM	Oracle	Not Sure	No real difference
2010	6%	9%	14%	5%	38%	29%

The jury is also still out on what customers expect from vendors in the future. Close to 70% of our survey respondents don't see any of the vendors assuming the role of facilities leader.

They also don't seem to believe that the size and scale of the soup-to-nuts vendors like IBM and HP gives them much of an advantage over the rest of the pack.

Our research clearly shows that customers just don't see much difference between the major x86 system manufacturers when it comes to energy usage, system density, or the vendor's ability to maximize facilities usage for their customers.

Given how much effort the systems houses have devoted to revamping their product lines to reduce power usage and increase space utilization, I'm sure they're hoping for a better mindshare return on those investments. However, it's difficult to make a name for yourself in a certain area when every other vendor is trying to stake out the exact same real estate.

We see facilities efficiency becoming even more important in the future. The ties between data centers and their facilities management are becoming tighter (evidence here). Power, cooling, and floor space consumption are an important factor in purchasing decisions now and will become more important in the future, according to our survey respondents (see those results here).

Vendors who can differentiate along these lines will improve their competitive position. We believe that customers are confused by competing vendor claims (as evidenced by the results above) and that vendors need to do a much better job of presenting their case and proving the value of their approach. No longer can they just say, "We're #1!" over and over.

Another factor that greatly influences real-world facilities usage is virtualization. A virtualized system is much more efficient in terms of power and real estate than a traditional, single-application box. Plus virtualization offers many other benefits in terms of IT costs, flexibility, and responsiveness.

Our survey included quite a few questions about virtualization. In addition to asking about adoption rates, we also asked customers whether they're getting the benefits promised by virtualization (those results are here). For the first time, we also asked which virtualization suite they're using and found much more diversity than we expected. Take a look here for those results.

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

Gabriel
CONSULTING GROUP

www.GabrielConsultingGroup.com
gcginfo@GabrielConsultingGroup.com
(503) 372-9389