2010 Survey: IBM/Dell Split Wins

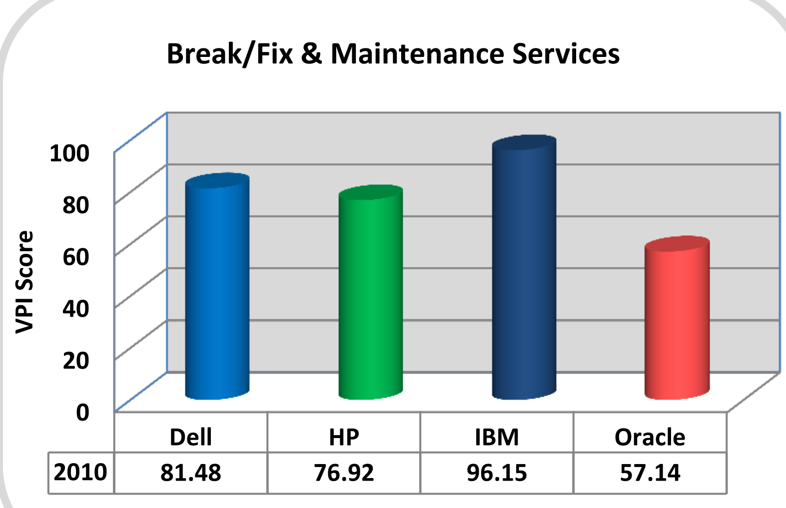
A major part of the **2010 GCG x86 Server Vendor Preference** survey is the Vendor Face-Off section. This is where we ask real-world data center personnel to rate the major x86 server vendors (Dell, HP, IBM, and Oracle) on a wide variety of technical, vendor support, and customer satisfaction criteria.

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 a lot of 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. Are all x86 servers alike on these characteristics? According to the people who purchase, manage, and rely on them day-to-day, the answer is a resounding "No!"

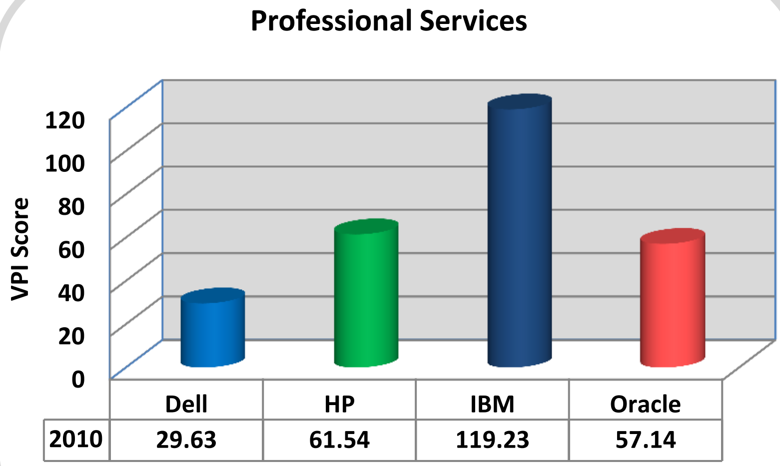
In this section of the survey, we're asking about services, including both the repair/maintenance and professional/architectural varieties. In many cases, the major system vendors aren't providing services directly to the customer. Even if the service agreement is negotiated directly with the vendor, services might be delivered by third parties. The quality of these services is definitely a reflection on the system manufacturer. It's the OEM who provides training, manuals, parts, advice, and an escalation route to the VAR or reseller. The vendor also needs to ensure that their solution bundles can be easily and quickly installed by the service provider.

So how did our survey respondents rate the major vendors on services? This first question touches on break/fix and maintenance services…



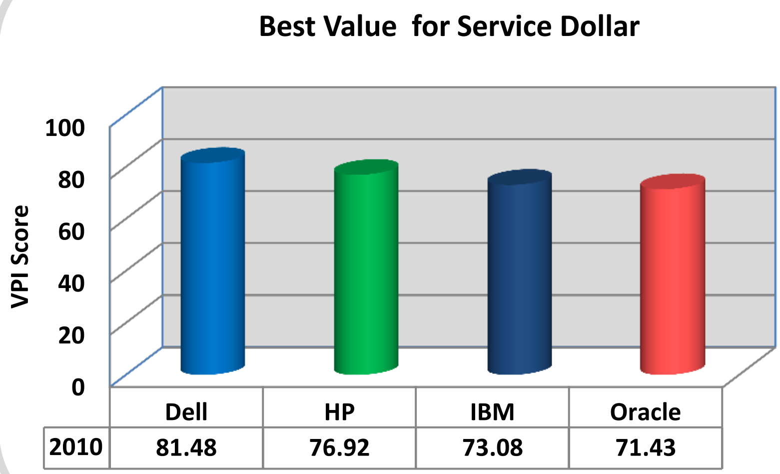
IBM notches a win on break/fix services in 2010, taking the lead from HP, who won this category in 2009. HP's scores dropped significantly from 2009, while Dell did quite a bit better. Oracle (then Sun) logged scores in the mid-90s during the first three years of this survey, but their 2010 score plunged to 57 – a huge drop that bears attention.

Vendors have improved in this area over the past few years. More customers are saying that there isn't much difference between vendors and that overall, they're satisfied with what they're getting.



IBM has owned this category since our first survey. This, their fourth win, is by a customarily large margin. Having the largest integrated IT services firm in the industry is certainly helping them out here.

HP's addition of EDS hasn't seemed to help them much, as their scores slid a bit since 2009. Dell made some strategic service acquisitions that also don't seem to be changing customer perceptions yet – but their score did remain stable year-to-year. Oracle suffered another big drop in this category compared with their 2009 result.



This is a nice win for Dell, a company that made their name with a low-cost, low-touch business model. This is the second consecutive year they've won this category against larger, full-service competitors.

This year saw a big drop in everyone's scores on this category. More than a third of our enterprise respondents answered "Not Sure" or "No Difference" on this question, sending the message that vendors aren't doing a great job of differentiating in terms of service value.

IBM grabbed two key wins in our service section, which is, of course, better than the alternative. However, we're noting a trend: customers aren't seeing as much difference between vendors as they have in the past. This could be because the vendors and their service-providing partners are all doing a bang-up job. Or we could be seeing the fallout of a bad economic year, when customers are using much less in the way of outside service providers. Whatever the case, it is clear that customers in this survey see services as less of a differentiator than ever before.

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

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