

2010 x86 Survey: IBM Takes Technology and R&D 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.

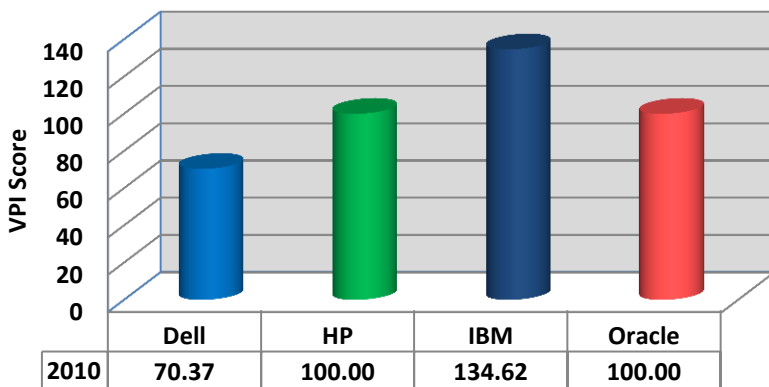
Vendors are rated in terms of their VPI score – a simple normalization technique we use to ensure that results aren't skewed. (For more details on the survey and methodology, [click here](#).) In simple terms, a VPI score of 100 is 'par'. Scores above 100 are good, and scores less than 100 – well, they're 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!"

The x86 platform is standardized for the most part. Vendors are constrained by the need to comply with the standards of the processor and the Windows/Linux operating environment. But there are still avenues of innovation open to system houses that desire to set themselves apart from the pack. This section of our survey is all about how customers view the major vendors in terms of their technology, roadmaps, and ability to deliver on their technology promises.

First, we ask a basic question: Which vendor has the strongest overall x86 technology?

Overall x86 Technology

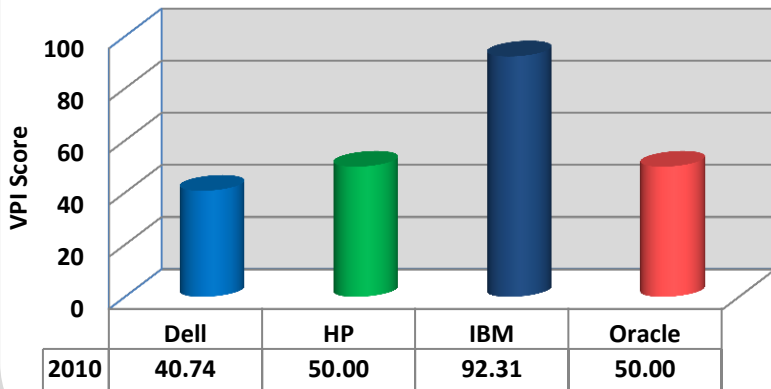


IBM shines on this question in 2010, with a strong lead over both Oracle and HP. This is IBM's fourth consecutive victory in this category. Part of this is attributable to the refresh of their product line earlier in 2010 that saw the introduction of advanced (and exclusive) features. IBM's custom x86 architecture and the advantages arising from it are paying off in terms of mindshare.

HP and Oracle scored well here, and even though Dell came in last, their score increased significantly from 2009.

Everyone has roadmaps, and everyone says that their roadmap is a shining example of the most ambitious, revolutionary, and flat-out brilliant set of milestones the world has ever seen... except Oracle. North Korea is more forthcoming on their roadmap than is Oracle – and they’re a bit more willing to comment on it, too. But that’s our opinion; here’s what customers think about how the major x86 vendors are doing on fulfilling their roadmaps in a complete and accurate manner.

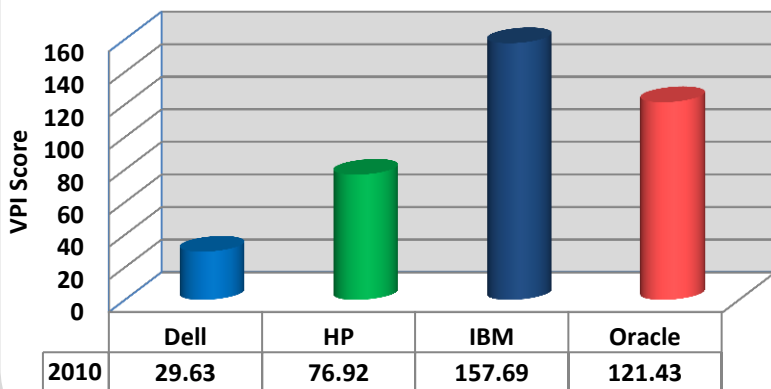
Adherence to, Accuracy of Product Road Maps



This is another win for IBM, and the second consecutive year they’ve taken this category. Everyone’s scores dropped on this question in 2010 with the exception of Dell, which eked out a small gain.

It’s another situation where a significant number of customers don’t see a lot of differentiation between the vendors. In this case, we think vendors are being a bit more conservative with their roadmaps these days – not wanting to be pilloried by competitors or the press for failing to meet their goals.

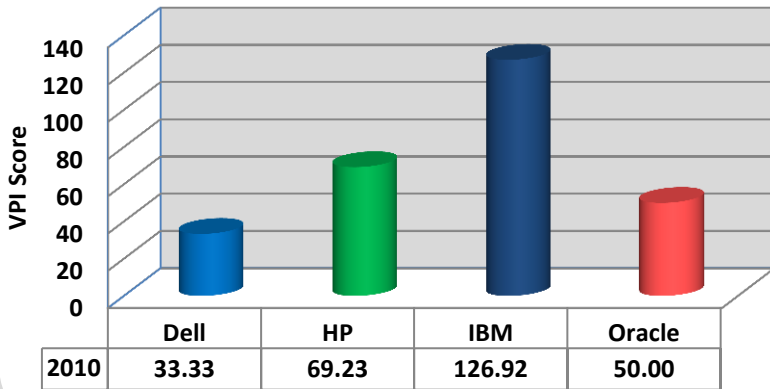
Technological Capability - R&D Prowess



Customers see IBM as the vendor with the best R&D and technical development chops. IBM has swept this category in all four years of this survey and has never been seriously challenged.

It’s interesting to note Oracle’s number two finish. Their scores on a number of categories dropped significantly since Oracle purchased Sun – but this is a bright spot. HP and Dell slid a bit from 2009, with voters from those shops defecting to IBM or Oracle on this question.

Technology Futures



Customers like the look of IBM's x86 future based on the results from this question. This win can be at least somewhat attributed to IBM's launch of their new X5 system architecture in 1Q10. They garnered a lot of attention with their memory drawer (MAX5) and solid state drive options.

All of the vendors announced new systems and upgrades during the survey period. Most of these were incremental improvements – new processors, blades, and more memory, for example – not exactly “stop the presses” type stuff.

In this edition of the survey, customers clearly see IBM as the thought leader in the x86 systems market. While HP had led in some of these categories as recently as last year, IBM's product introductions in 2010, with their advanced technology, seem to have captured our survey respondents' imaginations.

While futures are important, most customers are a bit more interested in the here and now. In our next installment, we see how well the vendors are doing from a solution perspective. Do customers believe that some vendors are better than others on particular installations? Do they see the vendors as being truly interested in the solution – or is it just a way to sell more gear? [Click here](#) to see what we found.

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