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Survey: Who Wins the x86 Server Solution Battle?

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.

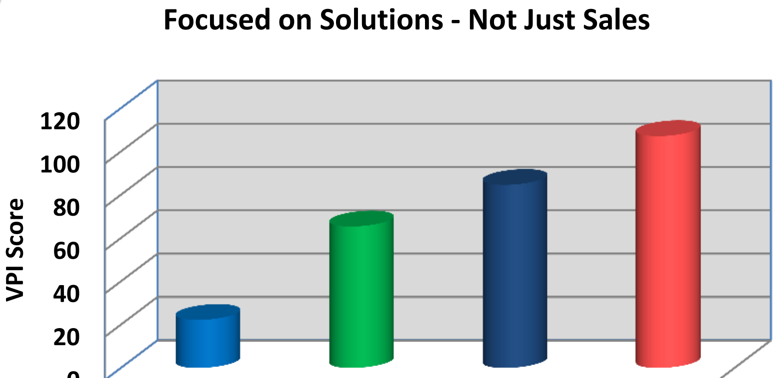
Vendors are rated in terms of their VPI score – a simple normalization technique we use to ensure that results aren't skewed. (For more details on the survey and methodology, click here.) In simple terms, a VPI score of 100 is 'par'. Scores above 100 are good, and scores less than 100 – well, they're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

'Solution selling' has been around for the last decade or longer as a vendor strategy and buzzword. The much-abused term 'solution' refers to a bundle of hardware/software, and often services, that provide a specific IT function or solve a problem.

Solution selling really came into vogue after the tech bust of the early 2000s, when many customers found that their 'best of breed' approach to IT left them with a huge array of expensive components that didn't connect together very well. This experience led directly to the current 'one throat to choke' mindset, where customers seek to reduce the need to integrate piece parts themselves and rely instead on vendors to do it for them.

In the survey we asked several questions about how well (or poorly) the major vendors provide solutions, rather than just components.

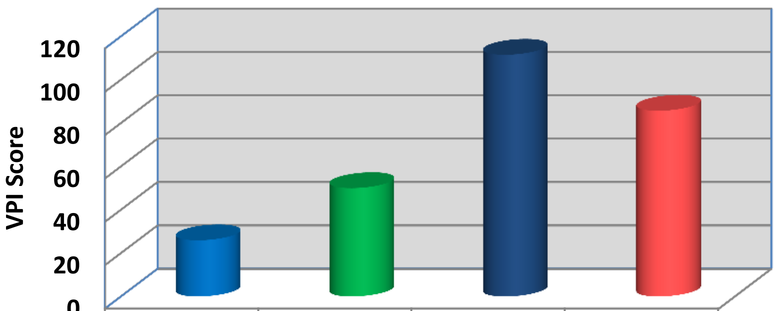


	Dell	HP	IBM	Oracle
2010	22.22	65.38	84.62	107.14

According to our survey respondents, in 2010, Oracle was best at selling solutions rather than just pushing boxes. This is one of Oracle's best results in the survey, and it was a strong point for Sun Microsystems when they were still independent.

IBM won this category last year by a wide margin, but fell off in 2010. HP's score was up this year, aided by closer relationships with ISVs and more solution bundles. Dell's results dropped considerably from 2009. However, a significant number of customers don't see much difference between vendors on this score.

Can Architect & Deliver Complex Solutions

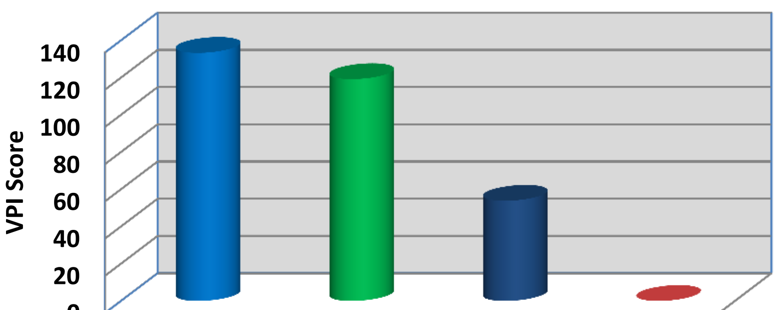


	Dell	HP	IBM	Oracle
2010	25.93	50.00	111.54	85.71

IBM notches a strong win on their ability to put together complex projects – a testament to their IBM Global Services organization. Oracle scores a surprise second place on this question, with HP and Dell pulling up the rear.

It's interesting that HP isn't yet getting much credit for their purchase of EDS. On other survey questions, the EDS acquisition was seen as a move that would help HP better compete with IBM. Dell hasn't had much of a service focus in the past, but is moving in that direction with their acquisition of Perot.

Strongest Windows Capability

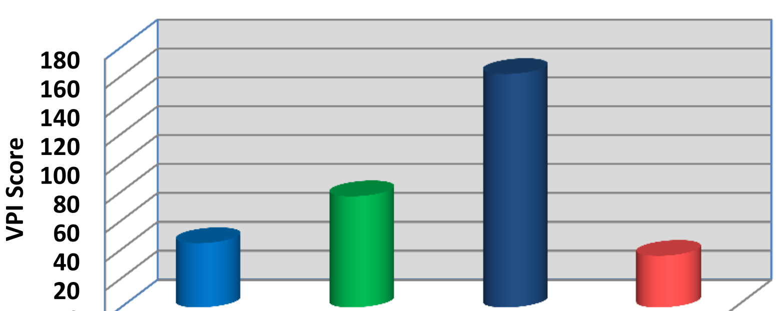


	Dell	HP	IBM	Oracle
2010	133.33	119.23	53.85	0.00

Customers see Dell as the vendor best suited for a Windows solution, a surprise win over the incumbent HP. Both companies have close relationships with Microsoft. On the other hand, IBM and Oracle's dealings with Redmond have had plenty of bumps along the way.

It's interesting to note that not one of our 199 survey respondents felt that Oracle was tops in Windows server capability. It's the first time we've ever seen a complete shut-out on a survey question.

Strongest Linux Capability

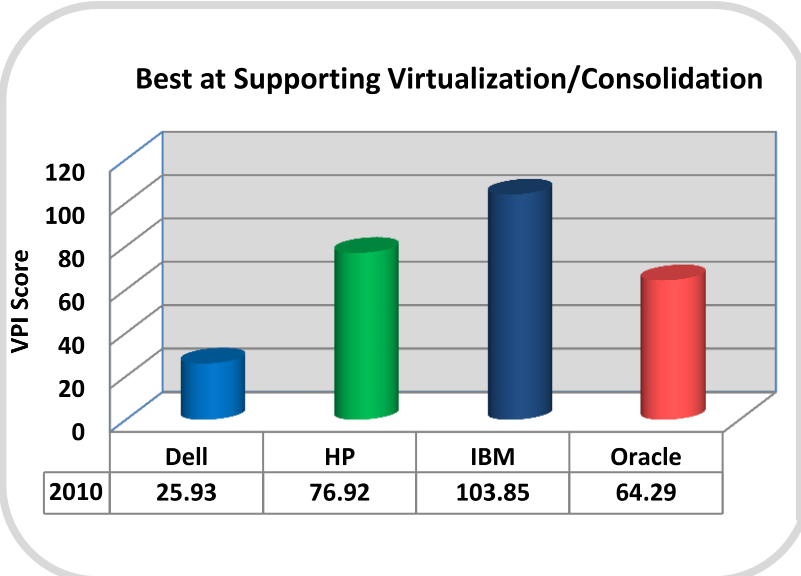


	Dell	HP	IBM	Oracle
2010	44.44	76.92	161.54	35.71

Back in 1999, IBM made a big commitment to Linux, funding many Linux development efforts and bringing Linux support to their system families. It's paying off in terms of customer mindshare, given the magnitude of their win on this question in 2009 and again this year.

It isn't that customers think that the other vendors don't support Linux; it's that they seem to most closely associate Linux and 'Linux friendliness' with IBM.

We don't ask about many specific solutions in the surveys, as it would make an already long survey much longer. However, we have been tracking virtualization as a solution and do ask customers which vendor has been the most helpful in this area…



In past surveys, IBM and HP have essentially tied on this question, with Dell and Oracle/Sun pulling up the rear. This year is a bit different; IBM shot into the lead in the minds of the customers we polled.

We think that this is mainly due, yet again, to the new systems they introduced in 2010. With that launch, they brought out virtualization-centric servers optimized for handling multiple workloads (more memory, pre-loaded virtualization, virtualization management, etc.) This has helped them carve out a spot as the virtualization vendor of choice in 2010.

Solution selling has rapidly moved from something that vendors use to set themselves apart from the crowd to being a customer expectation – a minimum ante to get onto the short lists. Staying with the 'best of breed' component approach for too long stunted Sun's growth and led to their long decline.

We're going to see the major vendors continue their quest to offer more solutions – either partnering with or acquiring companies that can make their bundles more attractive. For customers, this is mainly good news; it gives them comprehensive solutions from multiple players to choose from. It also will lead to a wider array of ways to handle particular computing tasks, as vendors bring out appliance-like specialized systems that are dedicated to a particular chore. This can be a good thing, but it could go too far and take us back to the bad old days of computing silos.

In our next installment, we're going to take a look at how customers see the vendors adding value to their data centers. Are the vendors helping them improve their IT efficiency and/or lower their TCO? Which vendor offers the best overall value for the money? Click here for details. And if you're interested in finding out more about this survey (demographics, expanded results, detailed GCG analysis), click here.

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