

**Blade Server Market Shares, Market Opportunities, Market Forecasts, and Market Strategies, 2008-2014**

**Blade Server Market Assessment**



*Picture by Susan Eustis*

**Blade Servers Provide Mountains Of Opportunity:  
Expand Small and Medium Business Markets By Improving Productivity  
and Implementing Automated Process**

**CHECK OUT THESE KEY TOPICS**

*BLADE SERVER MARKET FORECASTS*  
*Blade Server Market Driving Forces*  
*Blade Server Interoperability*

**IT Infrastructure**

Blade Server Regional Analysis  
IT Department Focus

*SERVICE LEVEL OBJECTIVES*

**UTILITY MODEL**

*PROFESSIONAL SERVICE CAPABILITIES*

**SUPERCOMPUTING**

*POWER USAGE OF DATA CENTERS*

**MODULAR FUNCTIONS**

**THIN FILM BATTERY**

**OPPORTUNITY ABOUNDS**

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## Blade Server Market Opportunities, Market Forecasts, and Market Strategies, 2008-2014

Blade vendors have positioned to help implement business strategy relative to real time exchange of information. Mid size businesses are positioned to use middleware to increase productivity. New systems are built on Web based middleware that is positioned to leverage the Internet as a channel for the supply chain, to partners, and directly to customers. Systems are useful for automation of processes that were previously manual.

A focus on network computer systems hardware gives mid size companies the ability to leverage shared workload and integration of applications on blades. Services oriented architecture (SOA) provides the ability to be responsive to changing market conditions. Messaging software renamed as ESBs supports SOA to effect exchange of information over the network. Network storage systems are adapting to the Internet and providing a thrust for blade servers.

Margins are slim on blade systems compared to mid-range server systems. Manufacturers are attempting to gain market share and sell volume. The anticipation of making profits from software, supplemental service, warranties, consulting, and systems integration is a market factor.

Blade servers consolidate and simplify the reduction of tangled cables. The spaghetti mess of 200 cables coming out of a 2-meter rack can be replaced with 3 to 6 cables saving as much as one half of the system cost. Replacing cables is significant for services as it is very easy to disconnect the wrong cable bringing down an entire system.

The blade server market showed continued growth in the first three quarters 2007. Blade servers include both x86 and RISC blades. Hewlett-Packard led the blade markets with 41% share, followed by IBM which maintained the number two position in the blade server market, with 38% market share.

Fujitsu Siemens maintained the number three market position with 10.7% market share. Sun was number four in the market with 5% share and Dell holds the number five market share position with respect of revenue of 3% share.

Growth drivers are Linux clusters and blades. Server consolidation is driving UNIX low-end substitution. The small and medium business market represents over 50% of the Intel-based market. Benefits of servers relate to the fact that systems are implemented in data centers and distributed computing environments. Servers are positioned as Web network devices that provide an integration platform.

Blades support the integration of multiple servers, storage, Ethernet switches, and networking blades. Blades are available at reduced cost in comparison to other servers.

Systems collapse the complexity of corporate datacenters by integrating servers, networks, storage and applications in one system. Blades run web sites and email systems, and also attack the most demanding computing tasks such as digital animation, genomic calculations and financial trading..

Worldwide total blade server markets at \$5.2 billion in 2008 are forecast to reach \$15.7 billion dollars by 2013.

## Companies Profiled

### Market Leaders

Hewlett Packard  
IBM

### Market Participants

Fujitsu Siemens  
Sun  
Dell  
Others

## Blade Server Strategies and Forecasts

2008-2014

### REPORT METHODOLOGY

THIS IS THE 326<sup>TH</sup> REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

## Blade Server Strategies and Forecasts 2008 to 2014

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