

Blades Server Strategies

**Local Communications Market Opportunities,
Market Forecasts, and Market Strategies, 2003-
2008**

Blades Market Assessment



Do Not Let Lack of Knowledge Cloud Your Mind

WinterGreen Research, Inc.

Lexington, Massachusetts

www.wintergreenresearch.com

CHECK OUT THESE KEY TOPICS

Blade Server Definition,
Blades Bring Shift In Server Design,
Modular Integration Platform,
WIRELESS HANDSET MARKET POSITIONING FACTORS
ROBUST MANAGEMENT TOOLS,
COMMUNICATIONS SERVICE PROVIDERS AS TARGET MARKET,
IMPACT OF DOWNTURN IN THE ECONOMY,
SOFTWARE ON THE EDGE OF THE BLADES

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

Blade servers consolidate and simplify the reduction of tangled cables. The spaghetti mess is literally 200 cables coming out of a 2-meter rack. It is very easy to disconnect the wrong one.

Hewlett Packard leads worldwide blade server market shares with 56% in 2002 in a \$158 million market. IBM is number two in the blade sever market with 22% market share participation.

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. In 2002, IBM gained 12 points in 4- way Intel servers, and 17 pts in 8- way Intel servers.

IT spending on blade servers at \$158 million in 2002 is expected to grow to \$11.8 billion in 2008. There was an increase from \$25 million to \$269 million in the worldwide low end blade market for the years 2002-2008.

Companies Profiled

2C Computing
Accton Technology
Agilent Technologies
AMD
Amphus
Brocade
Dell
Diversified Technology
Ensim
F5 Networks
Hewlett Packard (HP)
IBM
InfiniCon Systems
Intel
Motorola Computer Group
OmniCluster
RLX Technologies
Solectron / Force Computers
Sun Microsystems
TeraForce
Tatung Science and Technology Inc.
Themis Computer

REPORT METHODOLOGY

THIS IS THE ONE-HUNDRED SIXTY NINTH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, OR TELEPHONE EQUIPMENT. 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.

YOU MUST HAVE THIS STUDY

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