

**Blade Servers Market Opportunities, Strategies, and
Forecasts, 2005 to 2010**

Blade Servers



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

**WinterGreen Research, Inc.
Lexington, Massachusetts**

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CHECK OUT THESE KEY TOPICS

BLADE MARKET SHARES
BLADE SERVER MARKET FORECASTS
Blade Computing Market Driving Forces
Blade Servers

Next Generation Of IT Infrastructure
Real-Time IT Infrastructure
IT DEPARTMENT FOCUS

CONTROL OVER THE IT DEPARTMENT
BLADE PRICING

BLADE INTERCONNECT TECHNOLOGY
OPEN SPECIFICATION FOR BLADE SERVERS
SUPERCOMPUTING

CLUSTER FILE SYSTEMS
MODULAR COMPONENT-STYLE ARCHITECTURE FOR SERVERS
AUTONOMIC COMPUTING ATTRIBUTES
PACKET PROCESSOR RESOURCE BOARD (PPRB)

OPPORTUNITY ABOUND

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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 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.

IBM is the market leader with 44% market share and Hewlett Packard has 25% share. This is reversed from two years ago when Hewlett Packard was worldwide blade server market shares with 56% in 2002 in a \$158 million market. IBM was 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.

IBM eServer BladeCenter family has already seen the fastest sales growth in IBM server history. Unlike other servers, BladeCenter 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..

Companies Profiled

Market Leaders

IBM
Hewlett Packard (HP)

Market Participants

Egenera
Fujitsu
NEC
SteelEye
Tatung Science & Technology
Hitachi Ltd

F5 Networks
Motorola
RLX Technologies
Sun Microsystems
Topspin

Blade Server Strategies and Forecasts, 2005-2010

REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND THIRTY-THIRD* 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.

YOU MUST HAVE THIS STUDY

Blade Server Market Opportunities, Strategies, and Forecasts, 2005 to 2010

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ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

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