

WINTERGREEN RESEARCH, INC.

**Server Market Opportunities, Strategies, and Forecasts,  
2005 to 2011**

**Server Markets Expand as Internet Supports Supply Chain  
and New Distribution Channel**



*Picture by Susie Eustis*

**Mountains Of Opportunity To Serve Dynamic, Voice, Video,  
and Image Data To and From The Heartland of The Internet**

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

[www.wintergreenresearch.com](http://www.wintergreenresearch.com)

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**CHECK OUT THESE KEY TOPICS**

**SERVER MARKET SHARES**  
**SERVER MARKET FORECASTS**  
**Computer and IT Market Driving Forces**  
**Servers**

**Next Generation Of IT Infrastructure**

**Real-Time IT Infrastructure**  
**IT Department Focus**  
**Control Over The IT Department**  
**Server Pricing**  
**Data Center Technology**  
**Open Specifications For Servers**  
**Dynamic Computing**  
**Cluster File Systems**  
**Modular Component-Style Architecture For Servers**  
**Autonomic Computing Attributes**  
**Packet Processor Resource Board (PPRB)**

***OPPORTUNITY ABOUNDS***

**WinterGreen Research, Inc.**  
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## **Server Market Opportunities, Strategies, and Forecasts, 2005 to 2011**

**Server vendors adapt business strategy to focus on real time exchange of information on enterprise networks and the Internet. Network computer systems hardware leverages integration and messaging software. Network storage systems are adapting to the Internet.**

**Servers enable network solutions that attack cost and complexity, accelerate service delivery, and provide mobility with security. Core elements of server business strategy include provision for end-to-end architecture that extends technology across scalable processor architectures.**

**Open systems technology implementation and is being combined with x86-based products. Server products are positioned to provide price-performance, flexibility, and portable systems. Devices including RFID readers, smart cards, and cell phones are interconnecting to server systems. Clustered systems are a significant aspect of market evolution.**

**On-going innovation in microprocessor architecture, systems design, networking integration and software to help ensure continuing evolution of server technology. Market participants seek to achieve price-performance advantage.**

**Deploying services over the network requires a server infrastructure platform that is enterprise-ready, developer-rich, and economically compelling. Servers work as a combination of software, hardware and services that will give the customer value. Server platforms are positioned as systems that lower administrative costs, lower developer training costs, and provides high availability, high reliability.**

**IBM led worldwide server shipments measured in dollars with shares 29% in 2004, in a market that totaled \$49.8 billion in 2004 up from \$44.6 billion in 2003. Hewlett Packard is number two in the blade sever market with 26% market share participation in dollars in 2004.**

**The server market is anticipated to grow from \$49.8 billion in shipments in 2004 to \$81 billion shipments in 2011.**

## Companies Profiled

### Market Leaders

IBM  
Hewlett Packard (HP)  
Sun Microsystems  
Dell

### Market Participants

Egenera  
Fujitsu  
NEC  
SteelEye  
Tatung Science & Technology  
Hitachi Ltd

F5 Networks  
Motorola  
RLX Technologies  
Topspin

## 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**

## Server Market Opportunities, Strategies, and Forecasts, 2005 to 2011

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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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