



## IDC MarketScape

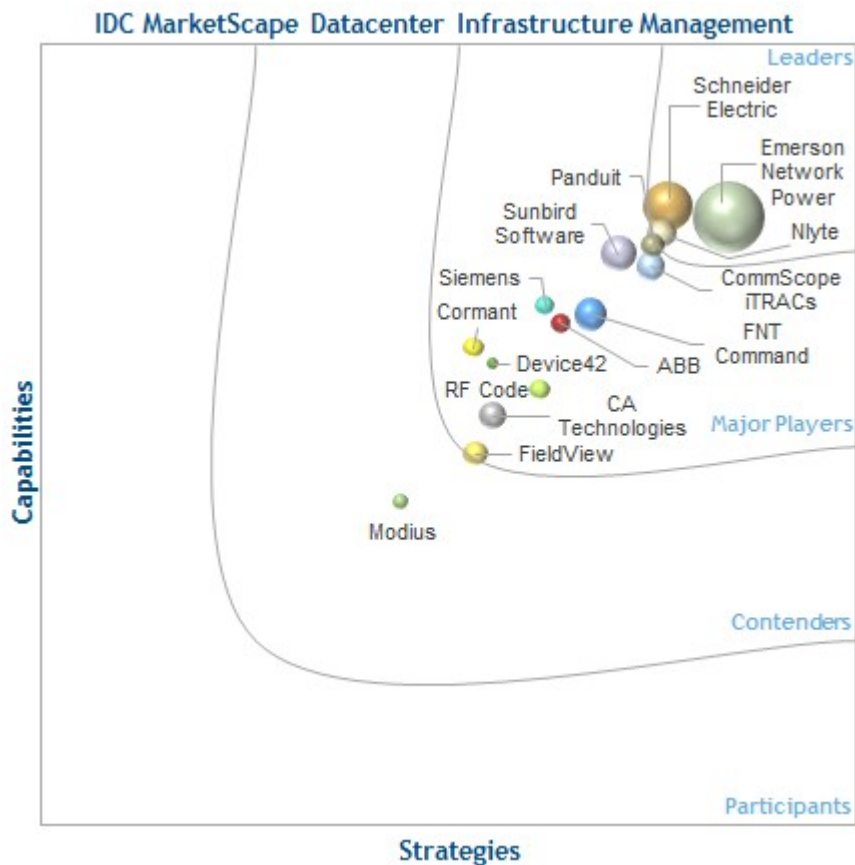
# IDC MarketScape: Worldwide Datacenter Infrastructure Management 2015 Vendor Assessment

Jennifer Koppy

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Datacenter Infrastructure Management Vendor Assessment



Source: IDC, 2015

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IDC OPINION

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The ultimate goal of a datacenter is to deliver IT service to end customers, and datacenter managers are under increasing pressure to deliver this service quickly, wherever and whenever needed, without compromising uptime and reliability. Datacenter infrastructure management (DCIM), when implemented well and supported across the enterprise, can be a critical step in delivering datacenter resources "as a service" to customers. Key steps in DCIM implementation are gaining support within the organization, selecting the best DCIM solution for the particular situation, and ensuring that the implementation of and ongoing commitment to the solution creates a positive outcome and shows a strong return on investment (ROI). Selecting the most appropriate DCIM solution should start with an assessment of the future strategy for delivering IT service to customers. With many enterprise IT organizations moving toward a distributed datacenter strategy, where the datacenter is a collection of resources (owned or colocated) in the different regions in which the company does business, it will be important to select a solution that can be localized to the region and also a services organization that can deploy and maintain the solution in all geographies. As many service providers seek to manage lights-out datacenters, the ability to remotely monitor and control resources becomes even more critical. The ability for a DCIM provider to enable secure connections and automate tasks becomes a competitive differentiator. When evaluating vendors, the key criteria companies should consider include:

- **Ability to integrate and interact with the many other management tools in the datacenter.** From disparate and legacy BMSs to cloud-based ITSM solutions, the ability for the DCIM solution to either feed data into another management solution or serve as the aggregator for disparate sources of data will enhance the usefulness to the entire organization.
- **Scalability of the solution to encompass very large sets of data from many datacenter types (on-premise, edge, and colocated).** As the datacenter evolves to become a distributed array of datacenter resources, the ability of the solution to reach across physical borders and aggregate real-time data in a secure way will be a competitive differentiator.
- **Investment in predictive analytics and automation technologies to enable the lights-out datacenter.** Monitoring capability is table stakes in DCIM, but running an agile and efficient datacenter requires the ability to analyze large amounts of data to drive proactive decisions on management and maintenance of resources.

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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This research includes analysis of 15 DCIM providers that sell solutions that enable visibility into components on the facilities side of the business (such as power distribution units [PDUs], uninterruptible power supplies [UPSs], sensors, generators) and components on the IT side of the business (such as servers, storage, networking equipment). Some offer control over the resources; others are monitoring tools. Beyond the basic product functionality, the providers were required to have solutions available for purchase for at least one year (since April 2014) and must earn at least \$2 million in revenue from the product in 2014.

## ESSENTIAL BUYER GUIDANCE

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Datacenter infrastructure management represents a collection of tools designed to increase the visibility and control over datacenter resources. Based on users' perspective, the term *DCIM* can mean different things. To IT professionals, the asset management and workflow functionality of DCIM is often

what is most relevant to their role. To facilities managers, the power and environmental monitoring and provisioning functions may be what they consider as an important functionality in a DCIM solution. In IDC's view, the coordination of these functions is central to a truly software-defined datacenter architecture. Developing IT agility and improving the delivery of service requires a comprehensive view and management of resources that incorporates all physical infrastructure from the ground up – including the critical facilities to the IT equipment contained within it mapped to the workloads they support.

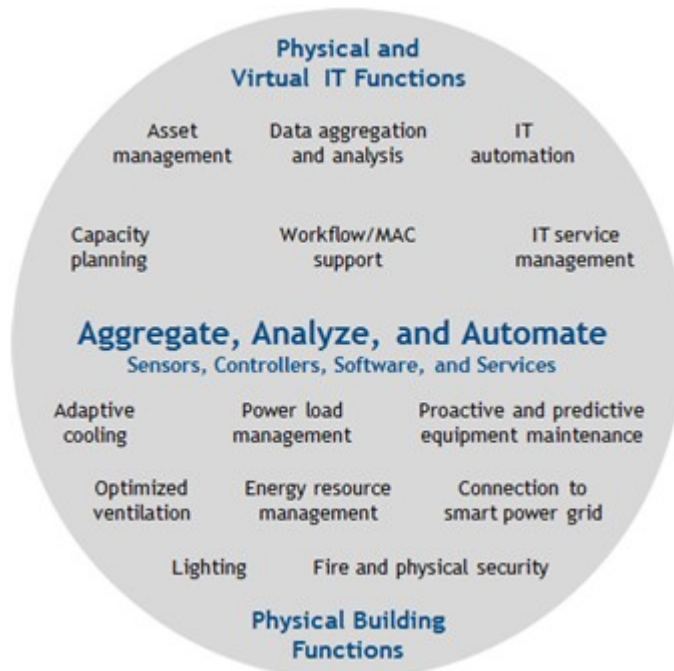
Each DCIM provider in this IDC MarketScape approaches the market a little differently, making a direct comparison of these collection of tools a difficult task. Some solutions are very comprehensive and resemble enterprise resource management (ERP) tools; others focus solely on physical location of assets and their connectivity with a basic power monitoring capability. Still others approach DCIM as a next-generation building management system (BMS).

Figure 2 shows IDC's depiction of functions required to run a smart-IT-enabled datacenter, which is a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. DCIM solutions cover much of this functionality, but not all providers cover all of the areas. In the Vendor Summary Profiles section, a figure is used for each vendor to generalize the vendor's area of focus in delivering a smart-IT-enabled datacenter.

In selecting the appropriate solution, IDC recommends considering some of the market forces that elevate the importance and escalate the need for better management of datacenter resources. In addition to comparing products based on the key problem they can solve, the capability of the services organization should also be a consideration. An honest assessment of the organization's ability to dedicate the human capital and time to implement the solution on its own is critical to success.

FIGURE 2

## Functionality of a Smart-IT-Enabled Datacenter



Note: IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery.

Source: IDC, 2015

## Increasing Energy Costs Drive Need for Greater Efficiency

- **Assumption:** Energy costs will rise, and regulations will be increasingly stringent, especially in Europe and Asia.
- **Impact:** Better management of datacenter resources, aided by an effective DCIM solution, often results in lower energy costs. In the beginning phase of the DCIM deployment, removing IT equipment that is consuming energy yet not contributing to the IT workload resulted in lower energy costs. The result is immediate savings in energy consumed to both power the equipment and cool the equipment.

## Preparing for a Software-Defined Environment

- **Assumption:** Compute, storage, and networking platforms are going through a disaggregation process to take advantage of standardized hardware and disaggregated software control. The underlying physical resources that support this infrastructure need to have built-in intelligence and software to provision power, cooling, and space resources in the datacenter.
- **Impact:** DCIM is an essential building block in developing smarter datacenter resource management. As the software-defined IT environment evolves, the underlying physical resource management will need to evolve to support it.

## Industrial Automation Meets the Datacenter

- **Assumption:** As end users seek "lights out" management of resources or increasingly rely on distributed datacenter locations, the ability to monitor and control resources will increase in importance.
- **Impact:** The need to reduce human errors in the datacenter is great, and technologies from the industrial automation market will take a foothold in the datacenter. We expect more product functionality and messaging relative to the remote management of resources.

A successful DCIM deployment will reduce spending on IT maintenance and shift that spending to projects that help the enterprise innovate and provide exceptional service to customers.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's offering.

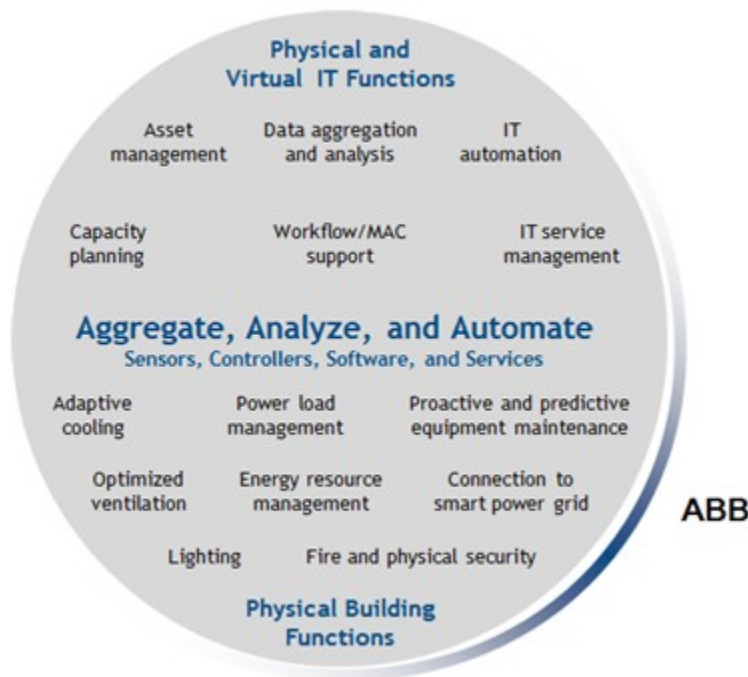
### ABB

ABB Decathlon for Data Centers is a robust solution that was purpose built for the datacenter industry based on the company's industrial automation engine solution called 800xA. ABB's approach to the market is in automating the factories of the Internet Age – datacenters. IDC believes this approach squarely addresses pain points that very large datacenters are experiencing today and will meet the needs of the growing large datacenters and megadatacenters, the more rapidly growing segments of the datacenter market as more workloads shift to the cloud and colocation sites. As datacenters are built out in expansive locations in modular fashion, the ability to perform analytics-driven management and automation of resources becomes a competitive differentiation. ABB is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Figure 3 shows IDC's view of Decathlon's functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. Decathlon's strength is on the physical building functions. The company's heritage with industrial solutions that require intense security measures translates well for the datacenter industry, which must also adhere to stringent security rules. While most other DCIM vendors stay clear of the access and control of the critical facilities equipment, ABB embraces this segment because of its experience in other industries. For the IT functions, ABB partners with Nlyte to deliver visibility and control up through the physical and virtual IT environments.

**FIGURE 3**

**ABB Decathlon Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

Decathlon for Data Centers is often installed in greenfield sites and either replaces or enhances building management systems (BMSs) and energy and power management systems (EPMSs) and extends this to infrastructure performance and capacity planning, providing a single automation and management platform for the datacenter. ABB has a history of providing automation for utility companies, as well as other mission-critical infrastructure such as large manufacturing factories and plants, marine, rail, and mines that require strong security measures and uptime. These core competencies translate well to the datacenter industry. To gain full value from Decathlon for Data Centers' control functionality, most implementations are done at the site build and are deeply integrated from the planning phase through to completion. For existing datacenters, the time and effort required to gain the level of connectivity to all the facility management functions may be considered too extensive to justify. However, the solution is open and extensible to the many connectivity protocols today (IPMI, Modbus, BACnet, including proprietary protocols) and can be accomplished. IDC has observed that many datacenter managers are wary and hesitant to add the control functionality to their DCIM solution because of security and downtime fears. At the same time, the number 1 cause of downtime in datacenters is human error, suggesting that automating tasks and limiting human intervention in the datacenter may decrease the likelihood of downtime. Gaining a datacenter manager/operator's trust in the control functions is critical, and IDC believes that a solution such as Decathlon for Data Centers has the foundation and strong track record for industrial-grade automation to build that trust.

Beyond the facility management and control, most IT operations personnel seek asset monitoring and management functionality from a DCIM solution. ABB offers its own application modules for energy, power, and building management, and it partners with Nlyte to add IT asset management and workflow functionality to Decathlon. The solution enables bidirectional handling and control of data across physical and virtual layers and among corporate, colocated, and cloud environments. ABB has integrated Nlyte functions to deliver a "single pane of glass" view into IT and facility resources. While some end users might prefer to have a DCIM solution from a single vendor, others may prefer a "best of breed" approach to DCIM functionality. IDC believes that a DCIM provider's ability to provide unified support for a customer will be the deciding factor in whether "best of breed" over a single-vendor solution is the best choice. Having one throat to choke, or one neck to hug, will be more important in the long run to end users.

Decathlon for Data Centers implementations, by nature of the physical and IT infrastructure automation controls, are customized to each site and involve professional services to optimize and integrate with other IT and facility management solutions. For end users looking for mainly help with asset management and workflow, ABB would not be on the short list. But for datacenters that are being managed as a business, delivering IT as a utility, and measured on their delivery and efficiency, a solution such as Decathlon for Data Centers provides the necessary control and visibility to drive autonomous datacenters.

### **Strengths**

ABB Decathlon for Data Centers' focus on delivering a secure solution for datacenter facility automation will garner trust from facility managers and datacenter managers because of the company's heritage in industrial automation.

### **Challenges**

ABB's challenge is in building brand recognition in a competitive DCIM market as well as furthering partnerships to address IT management to address the broader scope of datacenter management.

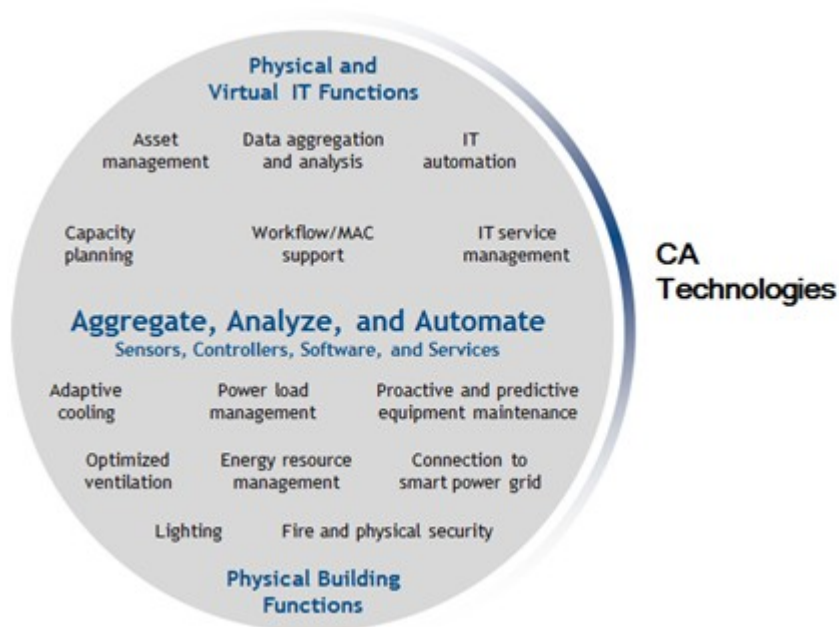
### **CA Technologies**

CA Technologies is a longtime provider of enterprise IT management software with a strong worldwide presence. CA Technologies' DCIM solution combines CA ecoMeter for monitoring functionality and CA Visual Infrastructure for management functionality. CA DCIM offers real-time visibility, control, and reporting on IT and facilities assets, with a focus on intelligent, self-learning alarming capability. CA Technologies is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Figure 4 shows IDC's view of CA DCIM's product functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. CA DCIM is squarely positioned to address the physical and virtual IT functions and enables real-time monitoring to aggregate and analyze data to drive efficiency in the datacenter. The CA DCIM solution has prebuilt connections that enable monitoring of the power and cooling equipment, under the physical building functions. The access and control of the critical facilities is not included in the solution. For security reasons, this is often preferred.

**FIGURE 4**

**CA-DCIM Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

CA Technologies had early success in the DCIM market with some key datacenter accounts. The company focused on large, strategic accounts and committed its global service organization to ensuring successful implementations of DCIM. A challenge for the company is in building trust on the critical facilities side of the DCIM equation. Developing relationships with service provider datacenters that have existing relationships with power and cooling providers (with their own respective DCIM solutions) has been a hurdle.

IDC believes that DCIM functionality will be delivered under the broader CA Unified Infrastructure Management (UIM) product umbrella. Based on the fact that much of the CA DCIM product development, marketing, and service personnel have been dispersed, IDC concludes that less focused will be placed on expanding the CA DCIM installed base. CA Technologies' focus for DCIM was always on larger, strategic accounts, and these customers will continue to receive service from CA Technologies' vast management software organization. The DCIM functionality is not going away, but it appears that the vendor will not invest in expanding its position in the market.

**Strengths**

CA Technologies is widely recognized for its global brand of management solutions and service organization, and its large installed base is likely to consider CA DCIM first for datacenter management needs.

## Challenges

The transitions within CA Technologies' DCIM group will make it difficult to grow market share in the DCIM market as it exists today.

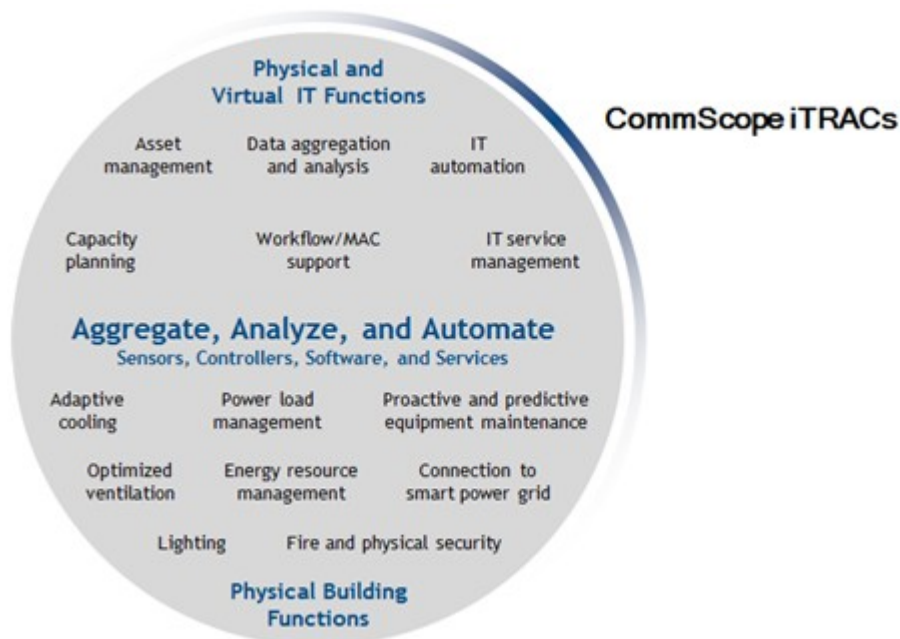
## CommScope iTRACs

CommScope iTRACs made a name for itself in the early days of DCIM with its software suite launched in 2009 that provides an interactive, navigable 3D visualization of datacenter resources with a management toolset. Founded in 1987, the company started with solutions that addressed connectivity and asset management, and its current DCIM platform is an extension of this legacy that provides visibility, control, and decision support across the physical infrastructure of assets, space, connectivity, power, and cooling. The company continues to innovate and refine its offering, and it has invested in more than 20 integrations with other enterprise management solutions to extend the value of the solution across the entire datacenter ecosystem. CommScope iTRACs is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Figure 5 shows IDC's view of CommScope iTRACs product functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. CommScope iTRACs is positioned to address both physical and virtual IT functions and enables real-time monitoring to aggregate and analyze data to drive efficiency in the datacenter. The open architecture enables connection with ITSM systems at the higher end of IT functions as well as connection with the critical datacenter facilities on the physical building side. CommScope iTRACs is packaged and sold as a complete software suite and is also available in individual modules that build off of the asset management module to address certain aspects of datacenter management, including capacity planning, connectivity management, change management, operational/power monitoring, analytics, and availability management. The individual modules remain tightly integrated and can be activated or deactivated according to what the customer requires.

**FIGURE 5**

**CommScope iTRACs Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

CommScope iTRACs is a \$5.3 billion infrastructure, connectivity, and wireless technology provider. IDC views the iTRACs technology as an integral part of CommScope's larger vision for the agile and efficient datacenter. CommScope iTRACs has a dedicated global sales and service organization. But future growth, especially in large service provider customers, will depend upon the ability of the larger CommScope enterprise sales and service organizations to include iTRACS into their discussions.

IDC believes there is significant potential for iTRACS within CommScope accounts and beyond, but it will depend upon the speed at which the wider CommScope sales and services organizations embrace iTRACS technology. CommScope iTRACs continues to invest in its selling partner network, and given the often complex nature of a DCIM sale and implementation, the company is investing heavily in training, qualifying, and incenting its selling partners to ensure customer success and satisfaction. IDC believes this approach will serve the company well in the long run; CommScope iTRACs has a strong customer retention rate compared with other providers, and the ability to continue delivering this level of customer support is critical.

The CommScope iTRACs solution is in use by a wide range of datacenter sizes, proving that it can scale from midsize datacenters up to very large service providers. One of CommScope iTRACs' strengths is in the company's ability to communicate the business value of DCIM, which has elevated conversations beyond asset management and power management problems and instead focused on the business of datacenters. In a highly competitive market, CommScope iTRACs has built up solid mindshare around its solution and has established a number of partnerships to grow its footprint.

For all large enterprise-class DCIM providers, simplifying the deployment and making the product easier to use have been challenges. CommScope iTRACs remains committed to improving the customer experience and has leveraged management resources to address this challenge. Its latest version, CommScope iTRACs DCIM 4.1, includes enhancements for ease of use, including the interactive, user-friendly CommScope iTRACs SimpleView browser-based visual interface.

### **Strengths**

CommScope iTRACs' success in the market is the result of the company's early focus on business value metrics derived from the data gathered. The company's customer-centric services group has led to a strong retention rate.

### **Challenges**

To grow further will require continued integration with CommScope iTRACs service and sales organization to deliver on corporate vision of connected, efficient, and agile datacenter.

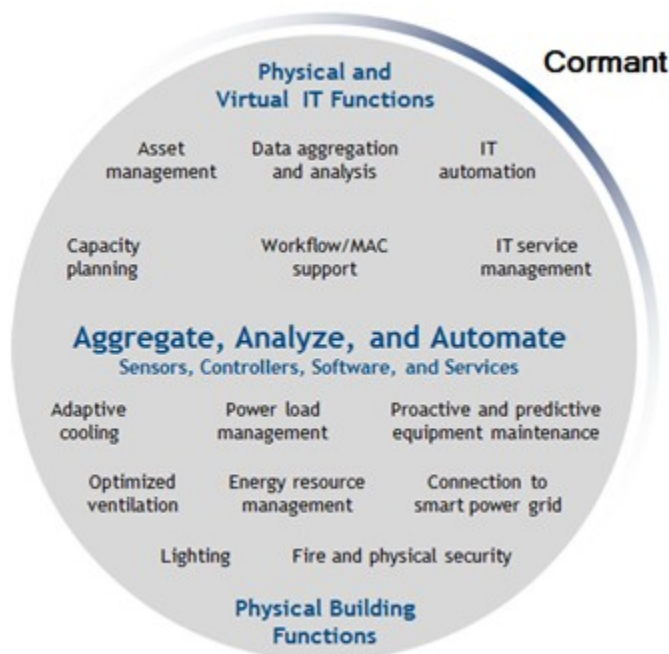
### **Cormant**

Cormant has been involved in datacenter management for many years, starting out as a cable management solution provider and growing its functionality to the Cormant-CS DCIM solution available today. Although a relatively small company, Cormant has built an impressive base of customers and has a high rate of customer retention. Mobile access and control are key features of Cormant-CS, which is sold as a single, complete solution. Cormant benefits from a tight connection among its service, sales, marketing, and R&D teams, allowing the company to operate efficiently and transparently to serve customer needs. Datacenter managers looking for asset visibility and cable management solutions and the ability to greatly reduce the complexity of audits find what they need with Cormant-CS. Cormant is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Figure 6 shows IDC's view of Cormant-CS product functionality aligned with the range of solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. Cormant-CS is positioned to address the IT management functions within DCIM, including cable management and connectivity, which few DCIM solutions offer natively. The solution enables auto-query and discovery of devices, workflow support, and analysis of real-time and historical data. The solution enables connections to monitor actual power consumption as well.

**FIGURE 6**

**Cormant Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

Cormant has experienced higher-than-average growth compared with the entire DCIM market. The product is sold worldwide through channel partners and is at a price point that represents a low barrier to entry. The company itself has proved its staying power and place in the industry, and the solution meets the pressing needs of many datacenter managers today. A barrier for some datacenter managers is the company's relatively small size compared with some industry heavyweights. Cormant's ability to build out the company's global service and sales organization, internally or through channel partners, will be essential to growth. In addition, Cormant's ability to partner with providers that focus on the critical facilities automation and control functions will secure the company's position longer term.

**Strengths**

Cormant's strength is the company's ease of implementation and use and the rapid time to recognizing value.

**Challenges**

Building mindshare with larger service provider customers and propelling the solution further up the value chain on the enterprise IT side may require partnerships with critical facilities hardware providers.

## Device42

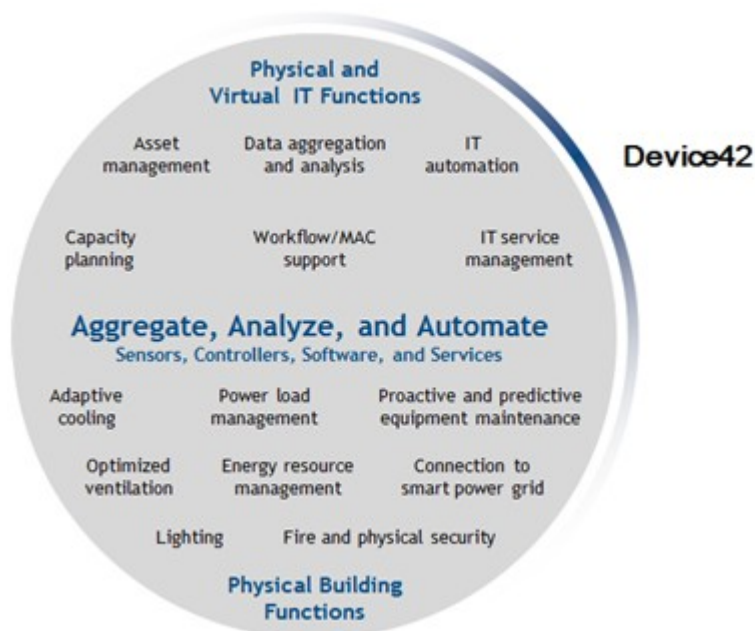
Device42 is a DCIM market disruptor and is growing at a pace that is estimated to be about four times that of the average DCIM vendor in terms of new customer footprints. The vendor's low-cost pricing model and try-before-you-buy approach has gained the attention of many datacenter managers, including large multinational organizations and service providers. Device42 is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Device42's solution includes modules for asset management, software management, power and environmental monitoring, application dependency management, power control, and cable management. In addition to the standard DCIM functions, the solution handles IP address management and password management.

Figure 7 shows IDC's view of Device42's product functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. Device42 is positioned to address the IT functions of datacenter management and offers connections to ServiceNow and JIRA solutions to coordinate the workflow and ITAM/ITSM functions. The access and control of the critical facilities is not included in the solution. For security reasons, this is often preferred.

**FIGURE 7**

### Device42 Functionality to Support the Smart-IT-Enabled Datacenter



Source: IDC, 2015

To date, Device42 says that most end users do not need much support because of the ease of implementation and self-service model, and the company does not have an extensive service organization. Because professional services are not required, the total cost of the solution is very predictable and has contributed to the strong early sales.

Ensuring continued customer satisfaction and success will be paramount for Device42 to continue on its current growth trajectory. IDC believes that many datacenter managers who have deployed DCIM actually have three or more solutions in place running simultaneously or on different portions of the datacenter. IDC expects that over time, datacenter managers will try to reduce the number of solutions they support. With Device42's ease of deployment and low cost to entry, it is an easy solution to investigate; continued use will depend upon its ability to deliver on its road map to further expand functionality. For datacenter managers looking to automate their critical facilities infrastructure, Device42 would not be on the short list of potential providers. However, most datacenters are dealing with the more immediate need today of gaining control and visibility over assets, which has led to stronger growth in DCIM solutions that are focused on the IT asset visibility problems, as opposed to energy consumption and efficiency problems. Longer term, as datacenters mature in their use of DCIM to represent the full coordination of critical facilities, Device42 may need to develop more partnerships as well as a global service organization to meet the needs of datacenter managers looking to increase the automation of all datacenter resources.

### **Strengths**

Device42's solution is easy to install and use, and end users report rapid realization of value from the solution. The vendor's low-cost model enables the circumvention of building an expansive business case to secure budget from management.

### **Challenges**

If a datacenter manager wants to expand functionality to greater automation and control over critical facilities, Device42 will need to invest in a broader service organizations and partners.

## **Emerson Network Power**

Emerson Network Power has a long history in the DCIM market and a large installed base of end users that are using Trellis and Aperture (from the Avocent acquisition in 2009 and Aperture in 2008). Emerson Network Power's purchase of Liebert in 1987 provided additional power and cooling monitoring functionality to the company portfolio. The Trellis platform represents the company's vision for consolidating these various capabilities for optimizing datacenter resources and connecting IT services with the physical facilities organization. Over the past two years, the company has been working on transitioning its installed base to the Trellis platform. This transition was a major platform shift in DCIM, with Trellis a complete re-architecture from the ground up. Through this process, Emerson has grown from its roots as a critical facilities equipment provider, learned the nuances required of a successful software and services provider, and emerged as one of the foremost DCIM solutions on the market today, with customers spanning from midsize internal/enterprise datacenters to large service provider datacenters. Through the transition, Emerson has built a portfolio of best practices with early adopter customers that it can leverage with customers that are new to the Trellis platform. Emerson is positioned as a Leader in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

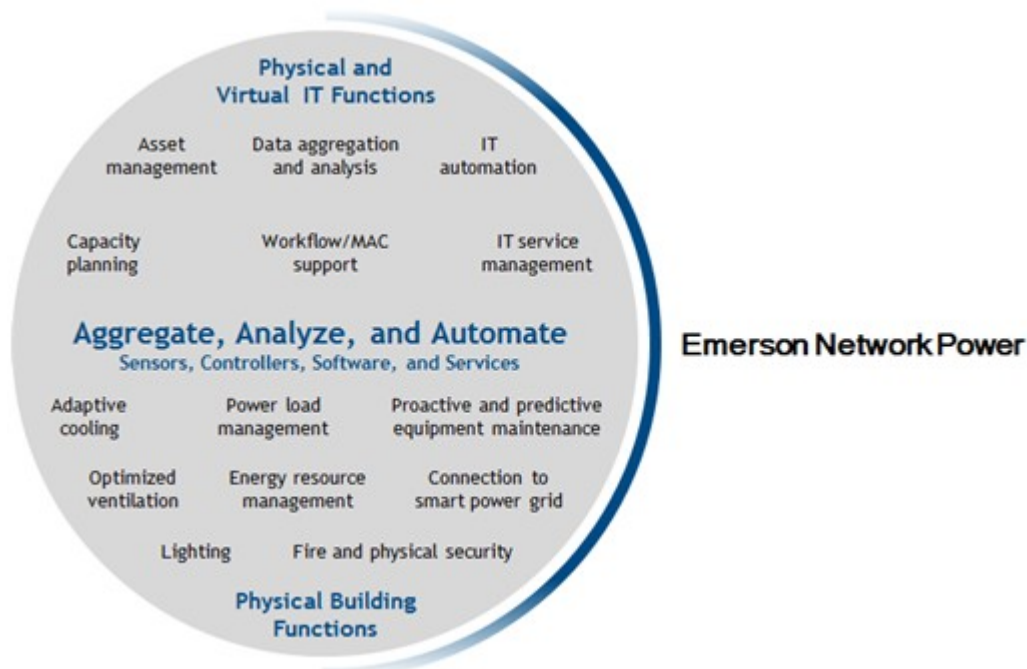
The Trellis platform was built as an integrated suite of capabilities to support datacenters that strive for increased agility and automation of resources. Emerson's customers rely on the solution to support

decisions on capacity planning, capital expenditures, audit compliance, problem identification and trouble ticketing, and optimizing the physical environment including power, thermal, space, and assets. For some users, setting up a comprehensive view of all datacenter resources that integrates with BMS and ITSM solution is daunting. A solution such as Trellis provides the most value when it is used across the organization by IT, facilities, and business units and integrates well with other management solutions. Recognizing that not all potential customers can make the commitment to such an expansive management initiative, the company is also offering specific bundles addressing specific operations within the datacenter. These bundles represent a low-risk entry point with quick ROI for the customer to DCIM. IDC believes these bundles will allow organizations to grow at a pace appropriate for them and take a gradual approach to better management practices.

Figure 8 shows IDC's view of Trellis' functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. Trellis' strengths are across the full spectrum of critical facilities, monitoring and automation, and IT management functions. While many DCIM vendors stay clear of the access and control of the critical facilities equipment, Emerson addresses this segment via Liebert environmental controls and automation. On the IT side, Emerson partners with ITSM providers to enable control up through the physical and virtual IT environments.

**FIGURE 8**

### Emerson Network Power Trellis Functionality to Support the Smart-IT-Enabled Datacenter



Source: IDC, 2015

IDC expects Emerson to continue with its strong investments in the Trellis platform to increase the automation of datacenter management and more closely align IT service demands with the critical facilities resources, covering a range of operating models. One of the strengths of the Trellis platform is the global service organization. With the increasingly global nature of business creating demand for resources in multiple geographies, the ability to manage from a central data repository while meeting the unique needs of the regional datacenters is a differentiator.

Improving ease of use continues to be a goal for most enterprise-class DCIM solutions, and Emerson Network Power has made investments to unify the end-user experience with Trellis with a common look and feel and streamlined processes with the solution.

## **Strengths**

Trellis is a comprehensive solution to support all aspects of datacenter management, from the critical facilities management and control side up through to the IT management layer. Emerson's global services organization has matured with the market and is a key selling point for companies with datacenter resources around the world.

## **Challenges**

As an expansive solution, Trellis is inherently complicated. Further improvements in ease of use and visualization to enhance and simplify the user experience will drive further adoption.

## **FieldView**

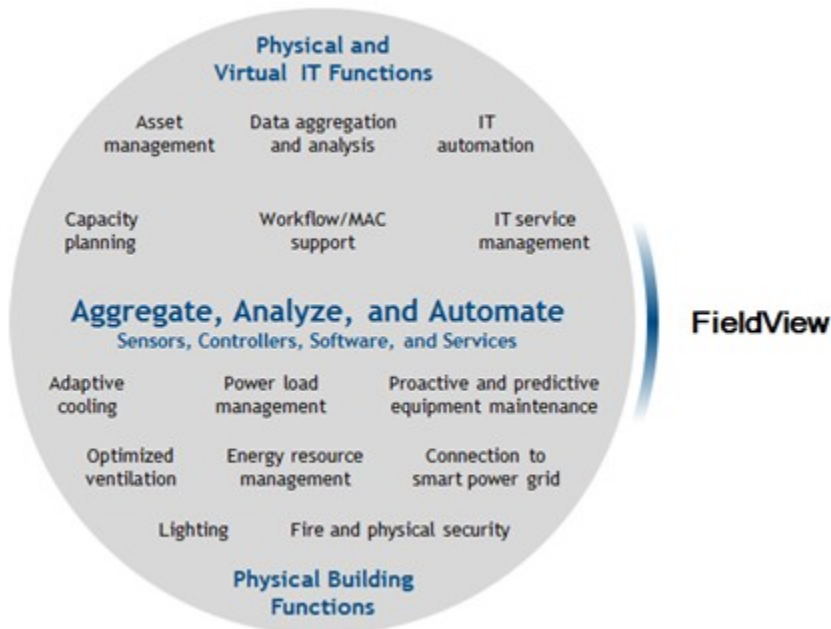
FieldView Solutions provides power monitoring and capacity planning functions of datacenter management. The company remains focused on large, mission-critical datacenters, and its customers value the solution's ability to adhere to stringent requirements for data security and asset control. As one of the first providers to offer support for multitenant datacenters, FieldView became a logical choice for colocation facilities, and its ability to gather data from disparate building management systems has been a critical feature in meeting the needs of this burgeoning market. FieldView is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

The latest release, FieldView 2015, enables "what-if" scenarios through the power chain to simulate conditions for possible changes, failures, and maintenance downtime within its PowerView module. FieldView is a monitoring tool that does not provide control functions. Some customers prefer this for security reasons. For other customers that want to make the data actionable, the LiveView module is an API-enabling third-party integration for live temperature and power data for other platforms. Through this API, FieldView is able to share its data with other tools to enable other systems to control equipment and provide dynamic/adaptive cooling, CFD modeling, and ITSM functions.

Figure 9 shows IDC's view of FieldView's product functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. FieldView is positioned to address the real-time monitoring of critical facilities to aggregate and analyze data with the goal of increasing efficiency in the datacenter. The solution enables connection with BMS on the physical building side.

**FIGURE 9**

**FieldView Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

Compared with other DCIM solutions, FieldView implementations can be accomplished rapidly and require less professional services. The asset management functions including logging and auditing IT equipment and integrating with workflow functions are typically what require the most time and expertise. If FieldView chooses to market its solution across the broader enterprise datacenter market, FieldView's ability to partner with or cross-sell with other solutions to extend the value of the data across the enterprise will be critical to future success.

**Strengths**

FieldView has the ability to collect and process large amounts of data and is a trusted provider in the DCIM market.

**Challenges**

FieldView's limited support for workflow and asset management functions inhibit growth in the enterprise datacenter segment.

**FNT Command**

Based in Germany, FNT was formed more than 20 years ago as a cable management vendor and worked on a project basis. In 2009, the company standardized its offering into a software solution that brought its capabilities in the infrastructure management and process management space to the broader DCIM market. Today, the company has more than 500 customers in industries including manufacturing, financial, and communications. The company has shown solid growth and has doubled

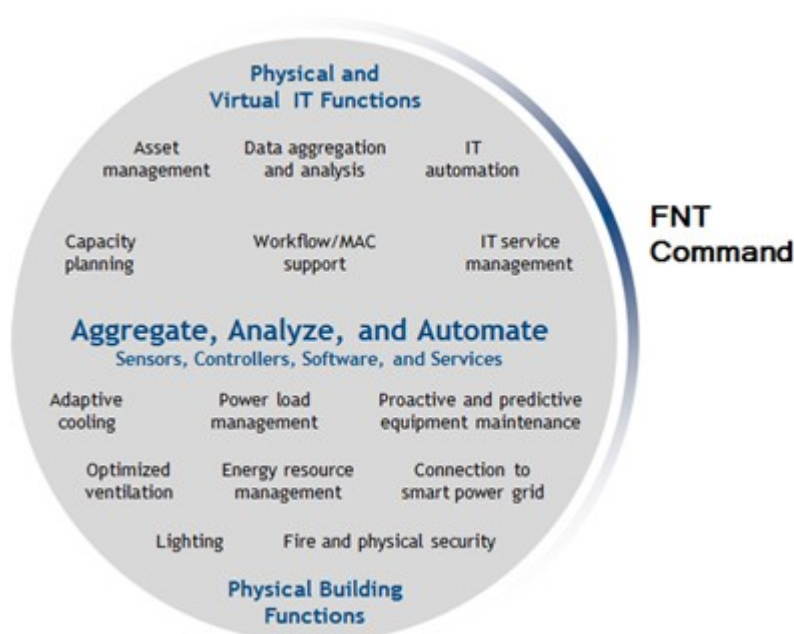
its workforce in the past three years to serve its customer base. FNT Command is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

FNT's Command software provides a central management hub and optimization platform for datacenters and enables a comprehensive and integrated view of resources including physical infrastructure (power, cooling, floor space, etc.), IT infrastructure (networks, servers, storage, etc.), and IT services (software, applications, and services). FNT Command is made up of four core modules and is an open solution to enable integration into upstream and downstream management systems.

Figure 10 shows IDC's view of FNT's Command product functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. FNT Command is positioned to address both physical and virtual IT functions and enables real-time monitoring to aggregate and analyze data to drive efficiency in the datacenter. The open architecture enables connection with ITSM systems at the higher end of IT functions, as well as connection with the critical datacenter facilities on the physical building side.

**FIGURE 10**

### FNT Command Functionality to Support the Smart-IT-Enabled Datacenter



Source: IDC, 2015

Many of FNT's customers have already integrated the DCIM database with an ITSM solution, which IDC believes is a more mature phase of DCIM adoption that delivers greater strategic value to the IT organization.

FNT customer base includes top German automotive manufacturers, and FNT has "cut its teeth" so to speak with an industry known for its extremely rigorous management of processes and automation of tasks to increase efficiencies in the manufacturing process. To FNT's credit, the vendor has successfully translated these best practices to the datacenter to enable greater efficiency, plan for future capacity needs, and measure and manage the datacenter in business terms.

## **Strengths**

FNT Command has proven that it has the ability to drive process change in very large, rigorous environments.

## **Challenges**

To expand into new markets, FNT needs to build global brand recognition and reputation in a competitive market.

## **Modius**

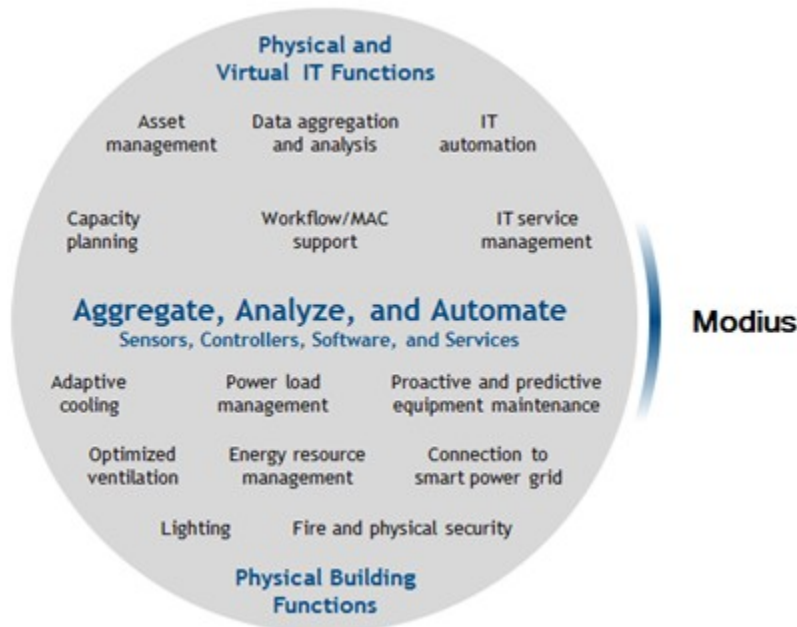
Modius has been providing software for datacenter and facility management operations for more than 10 years. Modius' OpenData software enables real-time monitoring of power and environmental conditions. OpenData's core capability is in the optimization of critical facilities equipment, and the company's vision is aligned with the expanding view of the datacenter as a collection of resources in separate physical locations. Modius is positioned as a Contender in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Modius understands well the need for continuous, real-time monitoring of critical infrastructure and integration with existing BMSs. Modius' method of monitoring devices is proactive and real time, and the company has built trust among facilities managers who depend upon the constant health checks. As the use case for DCIM matures beyond solving the low-hanging fruit of IT visibility issues and toward autonomous and remote control of resources, the benefits offered by OpenData will come to the fore. The company's focus on gathering large amounts of data and providing predictive analytics for better datacenter management will drive growth as the market moves beyond the IT asset management functions of DCIM and toward the smart building-like technologies driven by the IoT wave. OpenData integrates data collected from IT equipment to provide visibility on the IT side of DCIM, but the asset management aspect of DCIM has not been a strong focus of the company.

Figure 11 shows IDC's view of Modius' OpenData product functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. OpenData is positioned to address the real-time monitoring of critical facilities to aggregate and analyze data with the goal of increasing efficiency in the datacenter. The open architecture enables connection management tools to address IT functions as well as connection with BMS on the physical building side.

**FIGURE 11**

**Modius Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

IDC has observed that the vast majority of datacenter managers use three or more management tools to meet specific needs in gaining visibility and control over resources. When surveyed, most of these managers would prefer to reduce the number of tools they use. As other DCIM solutions become more comprehensive, it puts pressure on facilities-specific solutions such as Modius to proactively partner and integrate with other solutions to avoid being pushed out of place as consolidation of tools occurs.

For end users looking to monitor and optimize their critical facilities infrastructure, an open and scalable solution such as Modius OpenData should be on the list to consider. The company's focus on facilities and datacenter operations, while directly addressing a portion of the market, has limited its inclusion into wider datacenter transformation initiatives that require dynamic IT asset management and workflow elements. Modius' ability to reach potential customers through education and marketing initiatives, as well as the company's ability to partner with other providers to fulfill the wider initiatives, will be essential to achieve greater market adoption.

**Strengths**

Modius OpenData is a highly scalable solution that enables real-time monitoring of critical facilities. The company's vision of leveraging the massive amounts of data collected to power decisions is aligned with the functionality many datacenter managers will require in an ever-expanding collection of datacenter resources.

## Challenges

Modius fits a niche need in the market, and like many niche products competes for budget with many other datacenter projects. To gain market share will require Modius to make investments to address wider datacenter management needs and provide global service coverage.

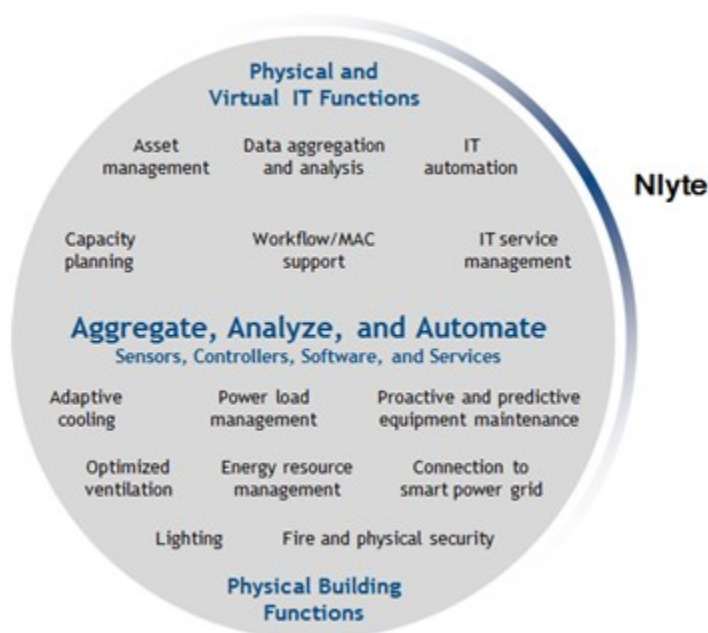
## Nlyte

Nlyte has earned a solid reputation in the DCIM space as a pure-play software company focused on optimizing datacenter resources through real-time and dynamic management of assets and workflow processes. Nlyte's solution addresses a pain point felt by essentially all IT organizations in the lack of visibility and control over datacenter resources. This pain point has become magnified as IT is continually asked to deliver service more quickly, with better reliability, and for less cost. Nlyte's success in the market is a result of the company's solution addressing this ubiquitous need and the company's ability to evangelize a better way of managing infrastructure. With the end goal of improving IT service delivery out of the datacenter, Nlyte's objective is to support better datacenter service management, and it has developed integrations with leading ITSM solutions to extend the value of these solutions through to the physical equipment management layer. Nlyte is positioned as a Leader in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Figure 12 shows IDC's view of Nlyte's functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. Nlyte's core capabilities lie in the IT management functions, with connections that enable visibility and control up through the virtual IT layer. Real-time monitoring and alarming of power and environmental conditions is enabled through the company's own Nlyte Alarms module and connections with products such as Intel DCM, Dell's OpenManage Server Administrator, FieldView's DCIM, and RF Code sensors.

**FIGURE 12**

**Nlyte Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

Nlyte's solution enables the wider management ecosystem to be more thorough and effective, and it has developed integrations with BMC, CA Technologies, HP, and ServiceNow. Becoming part of a larger management system requires building relationships and making the integrations as simple and pain-free as possible. IDC believes that Nlyte's flexibility to either serve as the single version of the truth or provide data and analytics that enable another management tools to serve as that source of truth will be a welcome respite for companies that are seeking to reduce the number of management tools they support and yet solve difficult management issues.

In the enterprise datacenter segment, cost continues to be a top reason for not implementing DCIM. Nlyte has addressed this hurdle by offering a SaaS model of Nlyte On-Demand and a free trial. Nlyte faces competition from other low-cost/low-risk/basic functionality solutions that have grown rapidly because of their ease of implementation and ability to circumvent CFO approval. Communicating the value of an enterprisewide management solution and the ability of its services organization to ease integrations with other management systems will be important for Nlyte's continued success in the market. With many competitors boasting very large, global services organizations, Nlyte's ability to expand the company's services reach around the globe either with in-house personnel or partners will be important.

### **Strengths**

Nlyte's core strength is the company's ability to solve key pain points in datacenter management and enable the transformation of management processes.

## Challenges

Growing into new markets will require Nlyte to expand the global reach of its services organization or further build its partnerships to provide service and support.

## Panduit

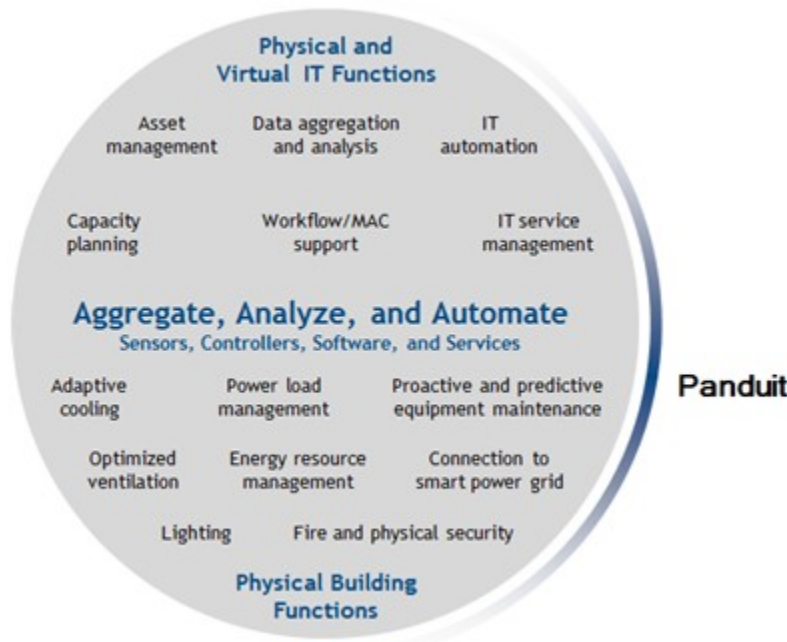
Panduit is a longtime supplier of cabling and datacenter infrastructure hardware, software, and services. Panduit has built relationships around the globe with organizations that design, build, and operate datacenters. The company is privately held. As a progression of its core strengths to organize infrastructure and solve business problems, Panduit developed its Physical Infrastructure Management (PIM) solution and in 2011 acquired Unite Technologies and subsequently the PowerIQ technology to complement PIM. Panduit is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Sensors in the datacenter to track location and environmental conditions are increasingly sought after by datacenter managers as a way to increase the accuracy and speed the collection of data to be analyzed. Panduit's acquisition of SynapSense directly addressed the company's customers' need for collecting and analyzing data and especially increasing control over cooling technologies. The combination of these technologies provides the core solutions to support Panduit's vision of building and managing the intelligent datacenter. Panduit has a strong vision for customers' evolving needs in managing the dynamic datacenter environment, including distributed datacenter resources and the datacenter Internet of Things (IoT). The SynapSense acquisition has the potential to bring new customers to the PIM solution.

Figure 13 shows IDC's view of Panduit's product functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. Panduit's DCIM solution spans across the IT functions and the physical building functions to deliver comprehensive visibility, management, and control over resources for both IT and facilities managers. Panduit's acquisition of SynapSense provides its solution with particular strength around the core data aggregation, analysis, and automation functionality.

**FIGURE 13**

**Panduit Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

A large portion of Panduit's business comes from physical infrastructure solutions including cabinets, racks, cabling, and routing, which it sells for converged infrastructure architectures including VCE and Cisco's UCS.

Beyond its datacenter-focused products, Panduit has an industrial automation division for the manufacturing sector. IDC believes there is potential for crossover of automation functions in the future, as certain datacenter environments become "lights-out" operations.

One of the hallmarks of Panduit is the company's strong focus on customer experience, and the vendor boasts a high customer retention rate for its DCIM solution. The company's DCIM solution has grown at a rate far higher than the market average, and IDC believes this is the result of its close relationship with key accounts and ensuring customer success and satisfaction. When the SynapSense product is fully integrated into Panduit's DCIM solution, the product will be more compelling and interesting because it will deliver powerful IoT functionality in a single management tool, which few DCIM providers can offer.

### **Strengths**

Panduit's key strength is the company's global service and support organization. The vendor's commitment to customer success contributes to the vendor's higher-than-average growth and customer retention rates.

## Challenges

As end users seek more streamlined and simplified ways of managing infrastructure, the user experience could be enhanced through closer integration of PIM, PowerIQ, and SynapSense solutions.

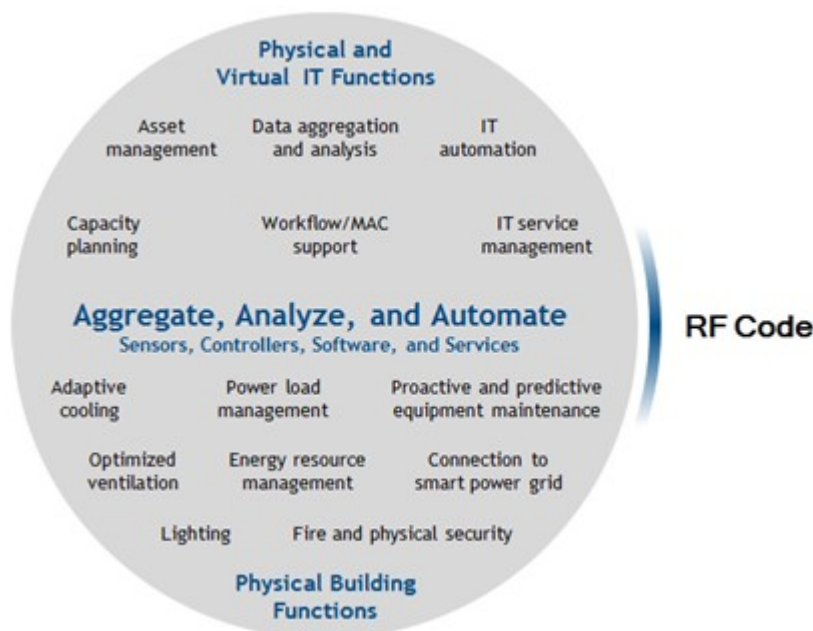
## RF Code

RF Code enables active asset management and environmental monitoring through a bundled solution of hardware, software, and services for datacenters and in other applications such as manufacturing and healthcare locations. The vendor doesn't actively position its solution as DCIM, but IDC considers the solution within the DCIM market because it gathers large amounts of data in real time for monitoring and analysis and offers a streamlined solution to provide asset management, capacity planning, and environmental monitoring. Some of RF Code's larger deployments are integrated with enterprise resource planning (ERP) applications to provide real-time, granular data to increase the accuracy of audits and provide financial accountability. RF Code is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Figure 14 shows IDC's view of RF Code's product functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. RF Code is positioned in the middle with the data gathering and monitoring functions, and it relies on partners to extend the management functionality through to the IT stack and the building management functions.

**FIGURE 14**

### RF Code Functionality to Support the Smart-IT-Enabled Datacenter



Source: IDC, 2015

RF Code was one of the first DCIM providers to announce asset management as a service and has gone to market with colocation provider CoreSite, providing a service to physically locate servers. This capability addresses asset management issues that the majority of datacenters face in the inability to find or account for IT assets. In this model, RF Code retains ownership of the asset tags and charges a monthly fee to monitor assets. IDC believes that this as-a-service model indicates the maturation of the DCIM market and expects to see other providers follow suit with innovative procurement and financing models.

Considering the datacenter as an Internet of Things testbed, RF Code was an early provider of the essential monitoring elements to drive real-time and remote intelligence on the state of the datacenter. The degree to which RF Code can provide (or partner with another vendor to provide) secure control resources for the datacenter will determine how well it grows with the market needs for proactive datacenter management.

RF Code squarely addresses the asset management issues that the majority of datacenters face with a streamlined solution to gain better control over assets, reduce the risk of compliance issues, and speed the time required to audit datacenter facilities. This need will increase as datacenters are an increasingly disparate set of resources in company-owned sites, in colocation sites, and in edge sites. As the market moves toward proactive maintenance, predictive analytics, and autonomous control, the bar for secure management and control will be raised. RF Code's ability to augment the company's current capabilities will determine its place in the future of IoT.

### **Strengths**

RF Code provides a streamlined solution for improving asset management in datacenters. Gaining real-time and trusted data for dynamic asset management solutions is a critical need for the majority of IT managers.

### **Challenges**

As a monitoring tool, RF Code competes for budget with many other IT projects. Securing its spot in the datacenter IoT space will require customer education and building mindshare around the value of its software and the ability to perform more advanced analytics and automation functions.

### **Schneider Electric**

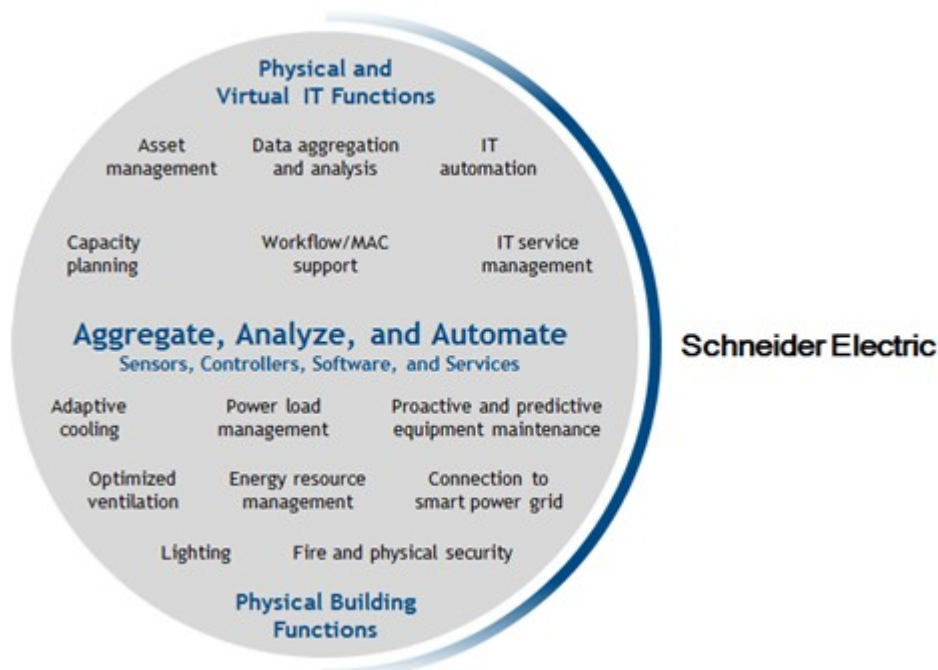
As a global provider of energy management and datacenter solutions, Schneider Electric has built a large installed base for its StruxureWare for Data Centers DCIM solution. The company's worldwide presence and position in designing, building, and managing datacenters make the StruxureWare modules a logical fit for extending the facilities and power management functions through to the IT management space. Schneider Electric is positioned as a Leader in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

StruxureWare for Data Centers is a collection of modules that address specific aspects of datacenter management and control. The company's vision of providing software modules to solve specific problems that may ultimately grow to adoption of the complete suite has worked well, and other providers in the DCIM market have also adopted the modular approach to selling. IDC has observed that datacenter managers often prefer to tackle (and pay for) one management problem at a time.

Figure 15 shows IDC's view of StruxureWare for Data Centers' functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. StruxureWare's strengths are across the full spectrum of critical facilities, monitoring and automation, and IT management functions. While many DCIM vendors stay clear of the access and control of the critical facilities equipment, Schneider enables this access via integration with its own Building Operation software and other BMS solutions. On the IT side, Schneider enables connection with BMC Remedy, ServiceNow, RF Code, Intel, HP, Cisco, and Microsoft to integrate with the physical and virtual IT environments.

**FIGURE 15**

### Schneider Electric StruxureWare for Data Centers Functionality to Support the Smart-IT-Enabled Datacenter



Source: IDC, 2015

Schneider views datacenter resources as increasingly distributed, and its vision for StruxureWare includes support for datacenters as a collection of physical facilities including on-premise, colocated, or cloud – and accomplishing this securely. To this end, it has architected its solution to provide a comprehensive view and support for multitenant environments and the ability to manage via a Web portal from any location.

One of Schneider's strengths is the company's global services and support presence, and many end users consider a worldwide presence a must-have quality in their DCIM provider as their businesses are increasingly global in nature. Despite heavy investment on the software side of its business and

partnerships to drive visibility through the IT layer, Schneider battles the perception that it is a facilities-centric and power-centric company. It is incumbent upon its services organization to drive a change in market perception and gain recognition for StruxureWare for Data Centers as a solution that delivers the business metrics and KPI data that identify the cost of service and allow the datacenter to be run as a business.

## **Strengths**

Schneider is a well-known and trusted provider of datacenter infrastructure and solutions. StruxureWare for Data Centers' early support for multitenancy and its momentum with colocation providers will propel its solution in the broader datacenter market.

## **Challenges**

To help customers achieve the most value from DCIM, Schneider would benefit from investments in services and initiatives to move customer base from early phases of DCIM maturity to more advanced implementations that enable more automation and integrations with ITSM.

## **Siemens**

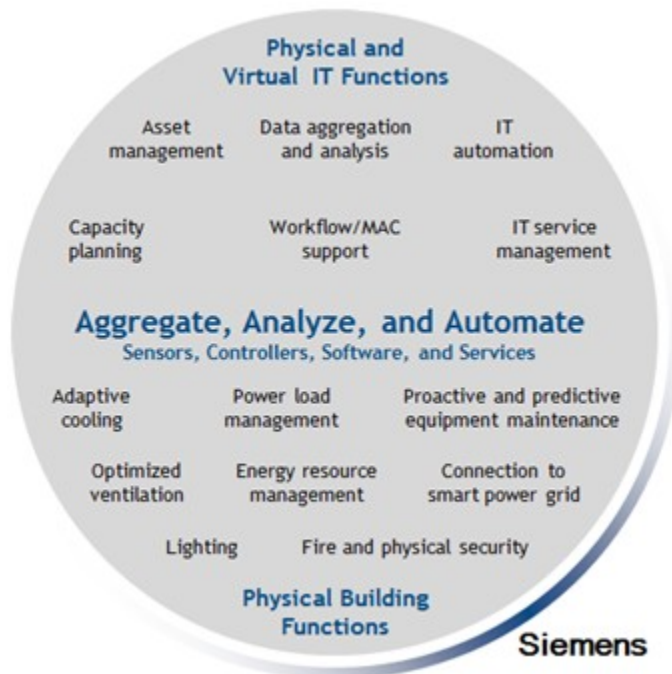
Although Siemens is a relative newcomer to the DCIM market, the underlying architecture to manage datacenters has been proven in other mission-critical applications. As the DCIM market moves toward greater automation and control over remote resources, solutions such as Datacenter Clarity LC will be sought after because of the company's strength in providing secure and automated facilities. Siemens is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Datacenter Clarity LC is powered by Siemens PLM Teamcenter, which has an installed base of millions and delivers industrial automation software for manufacturing, building technologies, utilities, and transportation companies. Datacenter Clarity LC is part of Siemens' wider ranging vision to provide solutions that deliver data-driven predictive maintenance and self-optimizing machines and remote maintenance.

Figure 16 shows IDC's view of Datacenter Clarity LC's functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. Datacenter Clarity LC's strength is in the physical building functions as well as real-time IT asset monitoring. The company's legacy with industrial solutions that require intense security measures translates well for the datacenter industry, which must also adhere to stringent security rules. Datacenter Clarity LC delivers IT asset management and workflow support and integrates with other enterprise system management solutions.

**FIGURE 16**

**Siemens Datacenter Clarity Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

Datacenter Clarity LC is developed by MAYA HTT Ltd. and is powered by Siemens PLM Teamcenter. The added value in the solution is Siemens' global R&D and services and support organizations. Siemens is focused on larger enterprise and service provider customers, and the level of integration with BMS on the critical facilities side and enterprise IT management solutions on the IT side necessitates a large services component. While many end-user organizations shy away from starting a DCIM initiative at an existing datacenter because of the complexity of connecting all the disparate systems, deploying in "brownfield" environments is something at which Siemens excels. This is a differentiator in the market, as connection to disparate management systems has been difficult for many providers.

End users that want a robust solution that integrates with the building control functions should include Siemens on their list to consider. Implementations of Datacenter Clarity LC by nature are highly services led and tend to be large and involved projects. Siemens is committed to the process change and people coordination elements that are required in a complex DCIM implementation. With the longer range goal of delivering greater automation and predictive maintenance in datacenters, the near-term DCIM project success is paramount.

### **Strengths**

Datacenter Clarity LC's robust back-end technology and large services team with experience in mission-critical automation technologies has driven some large initial wins for the solution. Facilities

managers who are hesitant to enable visibility and control over the critical infrastructure are more likely to trust Siemens than another less experienced DCIM provider.

## Challenges

As with other expansive management solutions, investments to increase ease of use and simplify the end-user experience through an intuitive product interface will be well received by end users. Siemens' ability to drive more integrations on the IT side will extend the value of its solution.

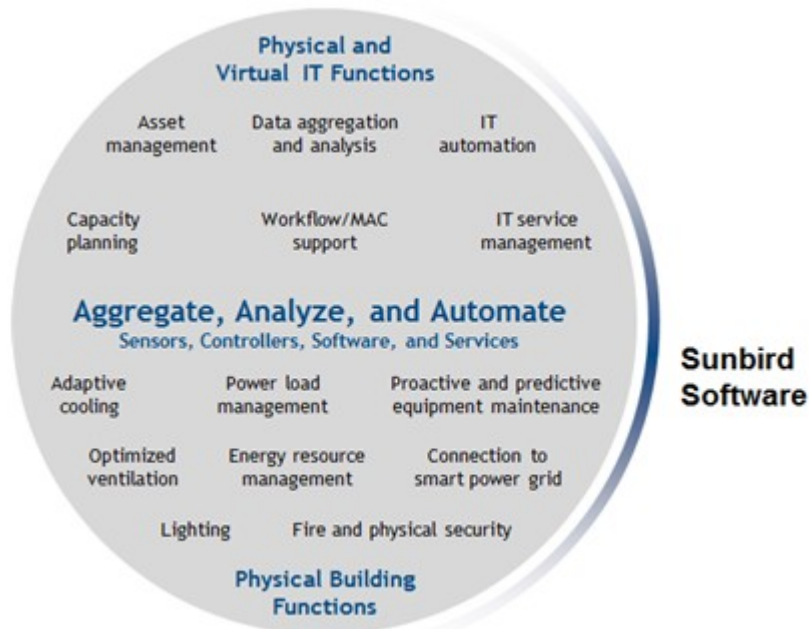
## Sunbird Software

Sunbird Software is the newly formed company based on the former Raritan software division, after the Raritan hardware business was sold to Legrand (official in September 2015). Sunbird DCIM is deployed in datacenters worldwide. Raritan entered the datacenter market in 1985 with KVM, power, and serial monitoring and management solutions. Today, Sunbird's solution includes dcTrack operations software for asset management, capacity planning, and change management and Power IQ monitoring software for real-time power equipment and environment and energy monitoring and management. The company supports asset management tags and sensors to increase the accuracy and speed of data collection. Sunbird has a well-established services organization focused exclusively on DCIM implementations. The company has a large installed base of datacenter customers, and the company's commitment to customer success has led to solid growth in the early years of DCIM adoption. Sunbird's goal with the company's new 5.0 release is to simplify user experience while aggregating and analyzing large amounts of data to show datacenters' health and capacity at multiple levels. Sunbird Software is positioned as a Major Player in the worldwide datacenter infrastructure management 2015 IDC MarketScape.

Figure 17 shows IDC's view of Sunbird's product functionality aligned with solutions that deliver a smart-IT-enabled datacenter. IDC defines a smart-IT-enabled datacenter as a facility that uses advanced automation and integration solutions to measure, monitor, control, and optimize facility and IT operations to speed the delivery of, increase the efficiency of, and increase the agility of IT service delivery. Sunbird is positioned well to enable visibility into IT assets, environmental conditions, and power capacity. The solution has the ability to leverage existing and new datacenter instrumentation to enable real-time monitoring and aggregation and analysis of data and thereby drive efficiency in the datacenter. Sunbird supports workflow and move/add/change support and also integrates with other enterprise management solutions via plug-in connectors and open APIs. The access and control of the critical facilities is not included in the solution. For security reasons, this is often preferred.

**FIGURE 17**

**Sunbird Functionality to Support the Smart-IT-Enabled Datacenter**



Source: IDC, 2015

Providers in the DCIM market generally come from one of two backgrounds – the critical facilities side and the software side. Being a software company spun out of a hardware company puts Sunbird in a unique position in the market. On the one hand, potential customers might view the decoupling of hardware and software sales as a positive, especially customers from the IT side that seek truly open solutions. On the other hand, potential customers that prefer to purchase from fewer vendors may look to another provider that sells a combined solution from one source. In reality, much of the volume of sales for Raritan came through channel partners and these partners' ability to cross-sell DCIM software with Raritan intelligent rack PDUs and other critical facilities equipment. These sales, however, may continue unencumbered because Sunbird and Raritan retained a strategic selling partnership agreement, and these partners are accustomed to packaging total solutions for customers.

One of the key strengths of Sunbird is the services organization. While the DCIM market was slower in 2013 and early 2014 as a result of end users recognizing the difficulty in populating the DCIM database and organizing assets, Sunbird-Raritan was able to gain a foothold in the market by remaining close to customers and helping through this often time-consuming and difficult process. Gaining visibility and control over datacenter resources that are already in use is a challenge for all end users, and this challenge is the reason that many have decided to deploy DCIM only in new datacenter builds. However, Sunbird DCIM has been equally successful in brownfield as well as greenfield datacenter deployments and scales well to support datacenters of many sizes.

## Strengths

Sunbird's commitment to customer success has led to the company's large installed base and high customer retention rate. The company has invested in education initiatives, and its services organization works closely with customers to ensure project milestones are met. This will fuel continued growth in the DCIM space.

## Challenges

The further integration of the former Sunbird-Raritan products under a single, unified brand will address end users' desire for more streamlined and simplified ways of managing infrastructure.

## APPENDIX

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### Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

### Market Definition

IDC defines DCIM as solutions that manage, optimize, and aid in planning for resources in datacenters, including IT hardware, power, cooling, and physical space. DCIM solutions, as defined by IDC, see components on the IT side (such as servers, storage systems, network switches, routers, and virtual machines) and components on the facilities side (such as cooling unit, power distribution unit [PDU], uninterruptible power supply [UPS], sensors, and generators). Access to these resources requires input and coordination between the facilities organization and the IT organization to create a

holistic view of the datacenter. According to IDC's definition, DCIM does not include proprietary software designed to monitor a single product.

## **Strategies and Capabilities Criteria**

The criteria against which the DCIM providers were scored were designed to account for the evolving nature of datacenter resources and the management challenges that come with those changes (strategy criteria), as well as the current challenges faced by datacenter managers, IT operations personnel, and facilities managers, and how well the providers are positioned to tackle these challenges across people, process, and technology layers (capability criteria).

Tables 1 and 2 show the key strategy and capability measures used in scoring the DCIM providers.

**TABLE 1**

**Key Strategy Measures for Success: Worldwide Datacenter Infrastructure Management Vendors**

| Strategies Criteria                                   | Market-Specific Definition                                                                                                                                                                                                                                                                                                                                                                       | Weighting |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>Offering strategy</b>                              |                                                                                                                                                                                                                                                                                                                                                                                                  |           |
| DCIM functionality road map aligned with future needs | The provider has disclosed a road map for existing products or a road map for forthcoming products, and flexibility for the future is built into this plan.                                                                                                                                                                                                                                      | 2.00      |
| Delivery model                                        | The provider offers or has plans to offer a SaaS delivery model as customers require it as well as channel partnerships to increase sales. Input and reporting from mobile devices will become a must-have feature in the future.                                                                                                                                                                | 1.50      |
| Cost management strategy                              | The provider has a strategy and road map for costs related to the development of, sales of, and support for DCIM offerings.                                                                                                                                                                                                                                                                      | 1.00      |
| Partner portfolio strategy                            | The provider has multiple partners in the market in multiple areas (facilities, IT, tracking and monitoring technologies, other system management vendors, etc.). This portfolio of partners supports either the DCIM product itself or the DCIM vendor.                                                                                                                                         | 1.00      |
| Services strategy                                     | The provider has the ability to educate customers and provide services in all regions where the customer reside. In addition, the provider should be able to work equally well with enterprises and service providers to meet their unique needs.                                                                                                                                                | 1.50      |
| Scalability strategy                                  | The provider has a strategy and road map to scale from small enterprise datacenters to large service provider implementations. Many end users will try out DCIM on a smaller scale and then expand as their expertise and ability (as well as budget) grows.                                                                                                                                     | 1.50      |
| Integrations strategy                                 | The provider has a strategy and road map for developing integrations for sharing data and collaborating with other enterprise management solutions upstream on the IT side and downstream on the BMS side.                                                                                                                                                                                       | 1.50      |
| Offering strategy subtotal                            |                                                                                                                                                                                                                                                                                                                                                                                                  | 10.00     |
| <b>Go-to-market strategy</b>                          |                                                                                                                                                                                                                                                                                                                                                                                                  |           |
| Pricing justification model                           | The pricing model is easy to understand and specifies the total cost of the DCIM solution including the software itself, deployment services, and any additional professional services required to enable the customer to recognize value from the expenditure. ROI calculators and the ability to quantify the value of the solution are essential for longer-term support of the DCIM project. | 1.50      |

**TABLE 1**

**Key Strategy Measures for Success: Worldwide Datacenter Infrastructure Management Vendors**

| Strategies Criteria                  | Market-Specific Definition                                                                                                                                                                                                                                                                               | Weighting |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| Sales/distribution strategy          | The sales and distribution strategy aligns with each product offering. This alignment makes procurement as easy for the end user as possible.                                                                                                                                                            | 2.00      |
| Market education strategy            | Marketing strategy includes a comprehensive plan for segmented, targeted audiences for each product and overall brand development, promotion, and demand generation. This plan corresponds with predicted revenue flows for the future.                                                                  | 2.00      |
| Customer service strategy            | There is a customer service strategy in place to reduce churn among the customer base and create brand evangelizers and brand loyalty. This plan is communicated clearly to customers.                                                                                                                   | 2.50      |
| Existing datacenter presence         | The provider has demonstrated a presence in the datacenter for some other product or service, besides DCIM. This could be power and cooling equipment, KVM, cabling, or other product or service. This category is meant to measure the history, size, and positive or negative nature of this presence. | 2.00      |
| Go-to-market strategy subtotal       |                                                                                                                                                                                                                                                                                                          | 10.00     |
| <b>Business strategy</b>             |                                                                                                                                                                                                                                                                                                          |           |
| Growth strategy                      | Management has targeted areas of the product, company, and customer base that they plan on growing over the next three to five years.                                                                                                                                                                    | 2.00      |
| Innovation/R&D pace and productivity | Innovation and R&D aligns with customers' wants and needs and growth strategy.                                                                                                                                                                                                                           | 2.00      |
| Financial/funding model              | The company's financing/funding plans and opportunities align to creating market value and staying true to the firm's core values, strengths, and attributes.                                                                                                                                            | 2.00      |
| Employee strategy                    | The company's management is well connected to attract and retain the best talent in the business.                                                                                                                                                                                                        | 2.00      |
| Partnering strategy                  | The company should build or strengthen its network of providers as appropriate to enhance the benefits of DCIM.                                                                                                                                                                                          | 2.00      |
| Business strategy subtotal           |                                                                                                                                                                                                                                                                                                          | 10.00     |

Source: IDC, 2015

**TABLE 2**

**Key Capability Measures for Success: Worldwide Datacenter Infrastructure Management Vendors**

| Capabilities Criteria                                                                     | Market-Specific Definition                                                                                                                                                                                                                                                                               | Weighting |
|-------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| <b>Offering capabilities</b>                                                              |                                                                                                                                                                                                                                                                                                          |           |
| Functionality/offering delivered                                                          | Solution enables visibility into all datacenter assets, gathers and processes large amounts of data to predict future state, drives proactive management, and enables lights-out management.                                                                                                             | 2.00      |
| Delivery model appropriateness and execution                                              | Solution can be delivered via multiple methods, including VM in the datacenter and SaaS, with an appropriate level of services.                                                                                                                                                                          | 2.00      |
| Cost competitiveness                                                                      | Solution employs methods of containing costs and reducing labor involved in deployment phase.                                                                                                                                                                                                            | 1.00      |
| Integration                                                                               | Solution has developed integrations for sharing data and collaborating with other enterprise management solutions upstream on the IT side and downstream on the BMS side.                                                                                                                                | 1.50      |
| Range of services                                                                         | The company is able to meet clients' needs in whichever regions they do business. Localization of the solution as well as expertise of services organization is considered.                                                                                                                              | 1.50      |
| Scalability                                                                               | Solution is able to aggregate and analyze large amounts of data in real time. Presence in multiple datacenter ownership types (on-premise and colocated) has been determined, as well as the ability to drive DCIM maturity.                                                                             | 2.00      |
| Offering capabilities subtotal                                                            |                                                                                                                                                                                                                                                                                                          | 10.00     |
| <b>Go-to-market capabilities</b>                                                          |                                                                                                                                                                                                                                                                                                          |           |
| Pricing model options and alignment                                                       | The provider is able to explain the total costs in a clear and concise manner and educate the customer on the total cost of a solution including services.                                                                                                                                               | 1.50      |
| Sales/distribution structure, capabilities                                                | The sales and distribution strategy aligns with each product offering. This alignment makes procurement as easy for the end user as possible.                                                                                                                                                            | 2.00      |
| Marketing                                                                                 | The marketing organization resources are aligned with revenue generation efforts.                                                                                                                                                                                                                        | 2.00      |
| Customer service                                                                          | The provider is able to meet the needs of all of its customers and respond in a timely manner to all customer requests.                                                                                                                                                                                  | 2.50      |
| Existing presence in the datacenter or in facilities organization in multiple geographies | The provider has demonstrated a presence in the datacenter for some other product or service, besides DCIM. This could be power and cooling equipment, KVM, cabling, or other product or service. This category is meant to measure the history, size, and positive or negative nature of this presence. | 2.00      |
| Go-to-market capabilities subtotal                                                        |                                                                                                                                                                                                                                                                                                          | 10.00     |

**TABLE 2****Key Capability Measures for Success: Worldwide Datacenter Infrastructure Management Vendors**

| Capabilities Criteria                | Market-Specific Definition                                                                              | Weighting |
|--------------------------------------|---------------------------------------------------------------------------------------------------------|-----------|
| <b>Business capabilities</b>         |                                                                                                         |           |
| Growth strategy execution            | The company has been and plans to continue executing on their growth strategy.                          | 2.00      |
| Innovation/R&D pace and productivity | Innovation keeps pace with the competition and is done in the correct areas organically.                | 2.00      |
| Financial/funding management         | To this point, the company has attracted enough promising funding to succeed in the market.             | 2.00      |
| Employee management                  | Once employees are hired, their talents are nurtured and developed.                                     | 2.00      |
| Partnering growth                    | Partners in solution and selling capacities drive the overall functionality and growth of the solution. | 2.00      |
| Business capabilities subtotal       |                                                                                                         | 10.00     |

Source: IDC, 2015

**LEARN MORE****Related Research**

- *Market Analysis Perspective: Worldwide Datacenter Trends, 2015* (IDC #258853, September 2015)
- *Worldwide Datacenter Infrastructure Management Solutions Forecast, 2015-2019* (IDC #256542, June 2015)
- *IDC PeerScape: Practices for Better Datacenter Infrastructure Management* (IDC #256625, June 2015)
- *Impact of Internet of Things on Datacenter Demand and Operations* (IDC #255397, April 2015)
- *IDC MaturityScape: Datacenter Infrastructure Management Solutions* (IDC #251705, October 2014)

**Synopsis**

This IDC study uses the IDC MarketScape model to provide an assessment of 15 vendors participating in the datacenter infrastructure management (DCIM) market. The IDC MarketScape is an evaluation based on a comprehensive framework and a set of parameters that assesses providers relative to one another and to those factors expected to be most conducive to success in a given market during both the short term and the long term.

"DCIM is a collection of tools to increase the visibility into and control over datacenter resources from the critical facilities layer up through to the IT management layer. The providers in this space approach these management challenges in different ways. As organizations investigate a software-defined approach to IT architecture, the inclusion of solutions such as DCIM that enable visibility through the critical facilities layer should be considered. This research uncovers the breadth and scope of the providers' offerings and their strategies for enabling datacenter resources to be viewed as pools of resources to enable greater agility and flexibility." – Jennifer Koppy, research director, Datacenter Trends and Strategies

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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