

PC POWER MANAGEMENT

Measuring, Monitoring and Managing Client Energy Consumption

The case for PC power management remains a compelling one. But in the long term, the sector faces a number of threats, to which suppliers must respond.

ECO-EFFICIENT IT

4 FINDINGS

- Power management suppliers continue to add new features, but overall differentiation between products has decreased. **PAGE 9**
- PM suppliers will increasingly focus on small and medium-sized companies, potentially through the use of SaaS. **PAGE 11**
- Desktop PM will continue to enjoy moderate to strong enterprise take-up from 2010-2014. **PAGE 23**
- Suppliers realize that the PM market is finite, and they are developing strategies to evolve their products. **PAGE 23**

5 IMPLICATIONS

- The ROI case for PC power management software will strengthen as power prices rise and environmental legislation is enacted. **PAGE 13**
- Microsoft has begun to take PM more seriously. This may be helpful for IT users as more PM functions are built into the operating system, but it could slow down demand for enterprise products. **PAGE 10**
- A higher percentage of enterprises have centralized PM tools in place, compared with smaller companies. SMBs may provide suppliers with growth opportunities, but may also require specialized products. **PAGE 11**
- Desktop virtualization and thin clients have the potential to significantly change enterprise desktop provisioning and management – PM included. **PAGE 24**
- Many large organizations will eventually adopt systems that allow for centralized enterprise energy management, and PM will be need to work alongside these systems, or be subsumed by them. **PAGE 25**

1 BOTTOM LINE

- There is strong demand for PC power management tools, driven by compelling ROI, increasing energy prices and emerging environmental legislation. However, in the longer term, virtualization, improving desktop hardware efficiency, saturation and operating system features, for example, will force suppliers to evolve their products or see them marginalized.

DECEMBER 2010

REPORT SNAPSHOT

TITLE	PC Power Management
ANALYST	Andrew Donoghue, Analyst, Eco-Efficient IT
RELEASE DATE	December 2010
LENGTH	43 pages

ABOUT THIS REPORT

There is strong demand for PC power management tools, driven by compelling ROI, increasing energy prices and emerging environmental legislation. However, in the longer term, virtualization, improving desktop hardware efficiency, saturation and operating system features, for example, will force suppliers to evolve or perish. Many large organizations will eventually adopt systems that allow for centralized enterprise energy management, and PM will be need to work alongside these systems, or be subsumed by them.

The past 36 months have witnessed a significant expansion in the number of suppliers offering PM products. Concurrently, the overall differentiation between products has decreased as suppliers learn from one another. This report examines the market for desktop power management products, including the technology currently available, adoption trends and user behavior, and the future direction of the market, as well as profiles of 19 prominent vendors.

TABLE OF CONTENTS

SECTION 1: INTRODUCTION	1
1.1 KEY FINDINGS	1
1.2 METHODOLOGY	2
SECTION 2: CLIENT COMPUTING, ENERGY AND CARBON	3
2.1 POWER CONSUMPTION AND IT	3
2.2 THE CLIENT CONTRIBUTION	4
2.3 POWER MANAGEMENT DEFINED	5
SECTION 3: POWER MANAGEMENT TECHNOLOGY	6
3.1 POWER STATES	6
<i>FIGURE 1: PC Power States</i>	7
3.2 WAKE-ON-LAN TECHNOLOGY	8
3.3 CLIENT PM TOOLS	9
<i>FIGURE 2: Desktop PM Functions</i>	10
3.4 WINDOWS AND PM	10
3.5 SAAS POWER MANAGEMENT	11
3.5.1 <i>Inhibitors to SaaS PM Adoption.</i>	12
3.5.2 <i>Existing SaaS PM Suppliers</i>	12
3.6 USER ADOPTION OF DESKTOP POWER MANAGEMENT	13
<i>FIGURE 3: Reasons Why Employees Leave PCs on Overnight</i>	14
3.7 MARKET ADOPTION AND DYNAMICS	14
3.8 COSTS AND RETURN ON INVESTMENT	15
3.8.1 <i>ROI</i>	15
<i>FIGURE 4: ROI Example</i>	16
3.8.2 <i>Rebates and Incentives</i>	16
3.9 POWER-MANAGING NON-WINDOWS DEVICES	17
3.9.1 <i>Apple OS X and Linux</i>	17
3.9.2 <i>Printers</i>	17
3.9.3 <i>Other Devices: IP Phones, Servers, Network Switches</i>	18
3.9.4 <i>Monitors.</i>	18

SECTION 4: CULTURAL AND TECHNICAL IMPEDIMENTS	20
4.1 CULTURAL AND BEHAVIORAL ISSUES: EMPLOYEES	20
4.2 CULTURAL AND BEHAVIORAL ISSUES: THE IT DEPARTMENT	21
4.3 TECHNICAL ISSUES WITH PM	22
SECTION 5: THREATS, OPPORTUNITIES AND EVOLUTION	23
5.1 THREATS TO DESKTOP MANAGEMENT SUPPLIERS	23
5.1.1 <i>Price Erosion, Commoditization and Competition</i>	23
5.1.2 <i>Open Source and Freeware Alternatives</i>	23
5.1.3 <i>Windows Dominance</i>	24
5.1.4 <i>Desktop Virtualization and Thin Clients</i>	24
5.1.5 <i>Improving Desktop Hardware Efficiency</i>	24
5.2 OPPORTUNITIES AND EVOLUTION	25
5.2.1 <i>Enterprise Energy Management</i>	25
5.2.2 <i>Smart Grids</i>	26
5.2.3 <i>Energy-Aware Applications</i>	26
SECTION 6: PC POWER MANAGEMENT SUPPLIERS	27
<i>FIGURE 5: Main Client PM Providers</i>	27
6.1 1E	28
6.2 CERTERO.	29
6.3 CISCO	30
6.4 DATA SYNERGY	31
6.5 DSSW	31
6.6 ENVIPROT GREEN IT	32
6.7 EVENT ZERO	33
6.8 FARONICS	34
6.9 IBM (BIGFIX)	35
6.10 JOULEX	35
6.11 LAKESIDE SOFTWARE.	36
6.12 LANDESK	37
6.13 MICROSOFT	38

6.14 NUMARA (CRISTON) 38
6.15 PC POWER DOWN 39
6.16 SETPOWER 40
6.17 SYMANTEC (ALTIRIS). 41
6.18 VERDIEM 41
6.19 VERISMIC 42

INDEX OF COMPANIES **44**

ABOUT THE 451 GROUP

The 451 Group is a technology analyst company. We publish market analysis focused on innovation in enterprise IT, and support our clients through a range of syndicated research and advisory services. Clients of the company — at vendor, investor, service-provider and end-user organizations — rely on 451 insights to do business better.

ABOUT TIER1 RESEARCH

Tier1 Research covers consumer, enterprise and carrier IT services, particularly hosting, colocation, content delivery, Internet services, software-as-a-service and enterprise services. Tier1's focus is on the movement of services to the Internet — what they are, how they are delivered and where they are going.

© 2010 The 451 Group, Tier1 Research and/or its Affiliates. All Rights Reserved. Reproduction and distribution of this publication, in whole or in part, in any form without prior written permission is forbidden. The terms of use regarding distribution, both internally and externally, shall be governed by the terms laid out in your Service Agreement with The 451 Group, Tier1 Research and/or its Affiliates. The information contained herein has been obtained from sources believed to be reliable. The 451 Group and Tier1 Research disclaim all warranties as to the accuracy, completeness or adequacy of such information. Although The 451 Group and Tier1 Research may discuss legal issues related to the information technology business, The 451 Group and Tier1 Research do not provide legal advice or services and their research should not be construed or used as such. The 451 Group and Tier1 Research shall have no liability for errors, omissions or inadequacies in the information contained herein or for interpretations thereof. The reader assumes sole responsibility for the selection of these materials to achieve its intended results. The opinions expressed herein are subject to change without notice.



*Analyzing the Business
of Enterprise IT Innovation*



Better perspective from the top in independent tech research