## **EXECUTIVE OVERVIEW**



# HIGHLY ENERGY-EFFICIENT DATACENTERS IN PRACTICE

Case Studies of Advanced Innovations in Datacenter Technologies and Techniques, 2012-2013

In-depth profiles of energy-efficient datacenters uncover the trends in tools, designs, deployment approaches and services at the forefront of facility efficiency.



#### **KEY FINDINGS**

- Datacenter operators are continuing to take a more proactive and holistic approach to energy and resource efficiency, rather than token or one-off efforts implemented in a reactive manner.
- Operators (often large cloud providers) are prepared to embrace a range of emerging and disruptive technologies if the cost benefits are perceived to justify the investment and risks.
   These approaches include use of fuel cells as a primary power source, use of seawater for cooling, and use of direct liquid cooling of servers.
- Owners of large datacenters (more than 5,000 servers) are more likely to adopt energy-efficient technologies than owners of smaller facilities (fewer than 1,000 servers).
- There are signs that the 'facilities bias' toward energy-efficiency measures is beginning to shift, and datacenter managers are now considering a more holistic approach that also includes the role of IT.
- We expect new metrics, and holistic approaches to measuring datacenter efficiency, to be more widely adopted by operators as they gain industry acceptance. Efforts here include the approval of PUE as an ISO Standard and the Digital Service Efficiency metric developed by eBay.

**AUGUST 2013** 



## REPORT SNAPSHOT

TITLE Highly Energy-Efficient Datacenters In Practice

ANALYSTS Andrew Donoghue, Senior Analyst,

Datacenter Technologies and Eco-Efficient IT

Rhonda Ascierto, Research Manager,

Datacenter Technologies and Eco-Efficient IT

Daniel Bizo, Senior Analyst,

Datacenter Technologies and Eco-Efficient IT

Katie Broderick, Senior Analyst,

Datacenter Technologies and Eco-Efficient IT

Sandra Vail, Managing Editor,

Datacenter Technologies and Eco-Efficient IT

RELEASE DATE August 2013 LENGTH 38 pages

## ABOUT THIS REPORT

Improving energy and resource efficiency is not a new issue for the datacenter industry, but it has traditionally taken a back seat to other considerations, such as maintaining uptime. However, over the last five to ten years, certain external factors – including rising fuel prices, carbon-emission reduction efforts and the credit crisis – have begun to push efficiency up the priority list.

This rise in energy-use awareness has helped drive the development of an increasing range of eco-efficient datacenter strategies and technologies by traditional datacenter suppliers, specialist startups and consultants. There is a wealth of information now available on how to make changes to datacenter design and operation in order to reduce energy and resource usage. This report is intended to look beyond theoretical solutions and supplier marketing, and instead concentrate on real-life projects and results.

# TABLE OF CONTENTS

SECTION 1: EXECUTIVE OVERVIEW
1.1 INTRODUCTION
Figure 1: Adoption of Energy-Efficient Datacenter Technologies
by Operators, Based on Number of Servers
Figure 2: Disruptive Technologies Deployed in the Field
1.2 KEY FINDINGS
1.3 METRICS, MEASUREMENTS AND STANDARDS
1.4 METHODOLOGY
SECTION 2: CASE STUDIES 10
2.1 GROUP ONE: AN INTEGRATED APPROACH TO EFFICIENCY
2.2 GROUP TWO: INNOVATIONS IN COOLING
2.2.1 Free Cooling
Figure 3: Server Reliability vs. Ambient Temperature
- Relative Failure Rates
2.2.2 Direct Liquid Cooling
2.2.3 Other Cooling Examples
Figure 4: Prevalence of Cooling Innovations Among Case Studies Profiled
2.3 GROUP THREE: POWER INNOVATIONS
2.4 GROUP FOUR: EFFICIENCIES FROM IT
Figure 5: Prevalence of IT Innovations Among Case Studies Profiled
2.5 SUMMARY
SECTION 3: SUPPLIERS, CONSULTANTS AND SERVICE PROVIDERS 35
Figure 6: List of Suppliers, Consultants and Service Providers
Included in Case Studies
3.1 SUPPLIER PROFILES
INDEX OF COMPANIES AND ORGANIZATIONS  39
ADDITIONAL RESEARCH 41

#### ABOUT 451 RESEARCH

451 Research is a leading global analyst and data company focused on the business of enterprise IT innovation. Clients of the company — at end-user, service-provider, vendor and investor organizations — rely on 451 Research's insight through a range of syndicated research and advisory services to support both strategic and tactical decision-making.

© 2013 451 Research, LLC 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 451 Research and/or its Affiliates. The information contained herein has been obtained from sources believed to be reliable. 451 Research disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although 451 Research may discuss legal issues related to the information technology business, 451 Research does not provide legal advice or services and their research should not be construed or used as such. 451 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.

