

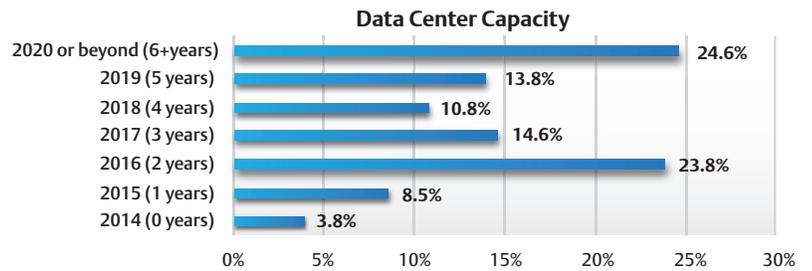


The Data Center Users' Group (DCUG) is a collection of influential data center, IT and facility managers formed by Emerson Network Power. Founded in 2003, the DCUG includes approximately 2,000 organizations who participate in a collaborative, focused forum that addresses the most relevant issues affecting the reliability, availability and cost of operation for critical installations

The group is surveyed twice each year to provide members with unique insight into data center trends and to ensure the group's meetings address issues of top concern to the membership. The results discussed in this report are from the DCUG survey that was completed in October 2014.

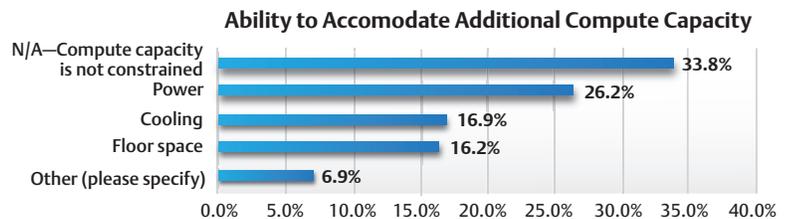
Through what year would you anticipate your current data center's capacity to be sufficient?

Answer Options	Response Percent	Response Count
2014 (0 years)	3.8%	5
2015 (1 year)	8.5%	11
2016 (2 years)	23.8%	31
2017 (3 years)	14.6%	19
2018 (4 years)	10.8%	14
2019 (5 years)	13.8%	18
2020 or beyond (6+ years)	24.6%	32
average		3.6 Years

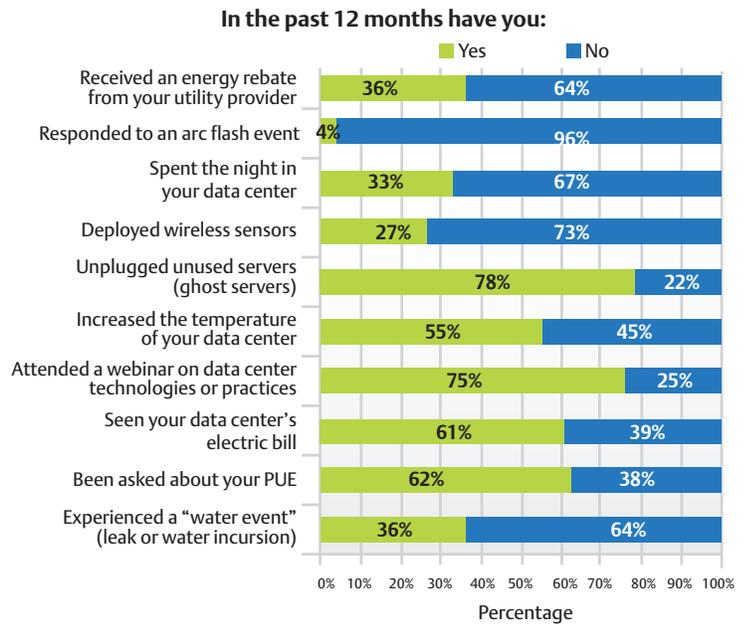


What one factor is having the greatest impact on your ability to accommodate additional compute capacity?

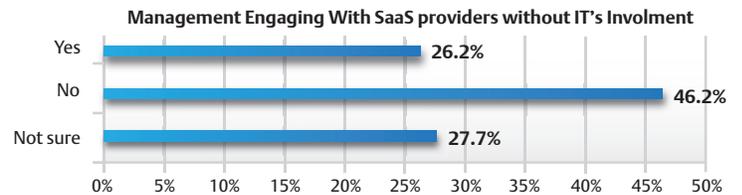
Answer Options	Response Percent	Response Count
N/A – Compute capacity is not constrained	33.8%	44
Power	26.2%	34
Cooling	16.9%	22
Floor space	16.2%	21
Other (please specify)	6.9%	9



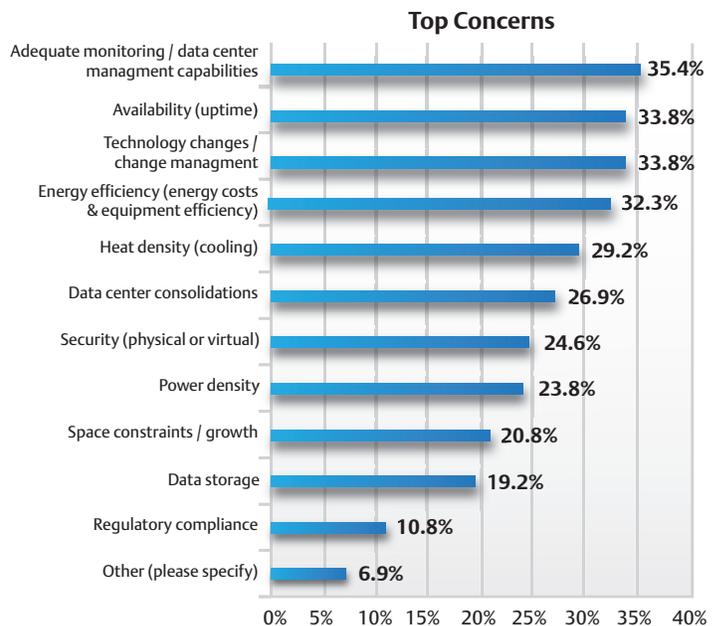
In the past 12 months have you:		
Answer Options	Yes	No
Received an energy rebate from your utility provider	47 36%	83 64%
Responded to an arc flash event	5 4%	125 96%
Spent the night in your data center	43 33%	87 67%
Deployed wireless sensors	35 27%	95 73%
Unplugged unused servers (ghost servers)	102 78%	28 22%
Increased the temperature of your data center	72 55%	58 45%
Attended a webinar on data center technologies or practices	98 75%	32 25%
Seen your data center's electric bill	79 61%	51 39%
Been asked about your PUE	81 62%	49 38%
Experienced a "water event" (leak or water incursion)	47 36%	83 64%



Are you seeing more managers or department heads in your organization engage SaaS providers (Salesforce.com, Eloqua, Oracle on Demand, etc.) directly without internal IT involvement?		
Answer Options	Response Percent	Response Count
Yes	26.2%	34
No	46.2%	60
Not sure	27.7%	36

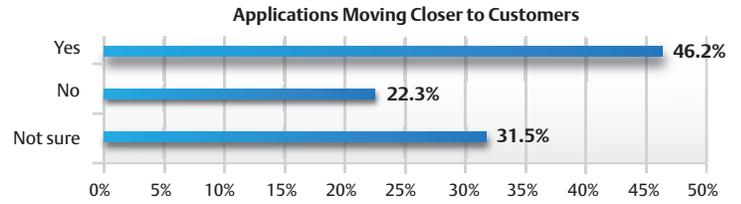


What are your top three (3) facility / network concerns? (Select 3 items)		
Answer Options	Response Percent	Response Count
Adequate monitoring / data center management capabilities	35.4%	46
Availability (uptime)	33.8%	44
Technology changes / change management	33.8%	44
Energy efficiency (energy costs & equipment efficiency)	32.3%	42
Heat density (cooling)	29.2%	38
Data center consolidations	26.9%	35
Security (physical or virtual)	24.6%	32
Power density	23.8%	31
Space constraints / growth	20.8%	27
Data storage	19.2%	25
Regulatory compliance	10.8%	14
Other (please specify)	6.9%	9



Within your organization, are applications moving closer to your customers/users?

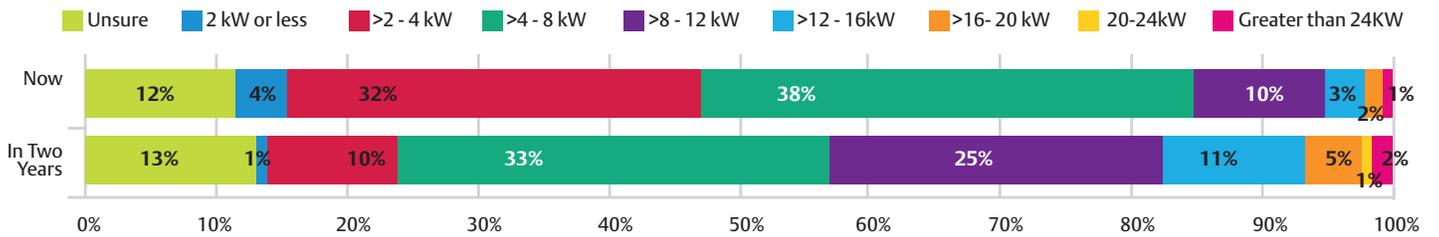
Answer Options	Response Percent	Response Count
Yes	46.2%	60
No	22.3%	29
Not sure	31.5%	41



What is the average power density (in kW) per rack in your data center now and in two years?

Answer Options	2 kW or less	>2 - 4 kW	>4 - 8 kW	>8 - 12 kW	>12 - 16 kW	>16 - 20 kW	>20 - 24 kW	Greater than 24 kW	Unsure	Average
Now	5 4%	41 32%	49 38%	13 10%	4 3%	2 2%	0 0%	1 1%	15 12%	5.83
In Two years	1 1%	13 10%	43 33%	33 25%	14 11%	6 5%	1 1%	2 2%	17 13%	8.90

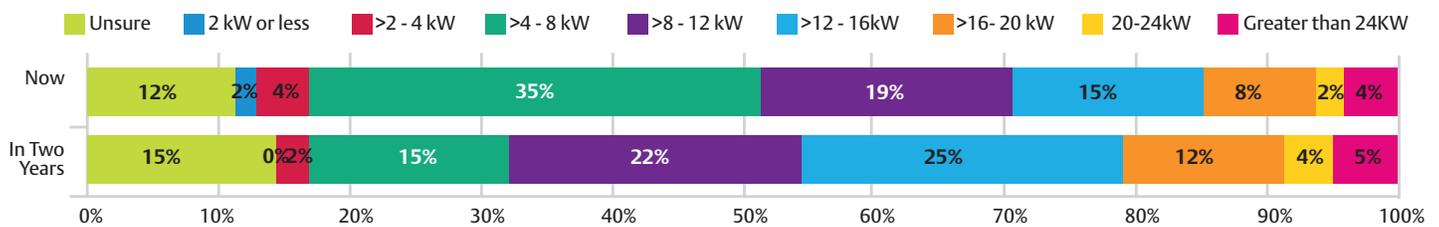
Average Power Density



What is the maximum power density (in kW) per rack in your data center now and in two years?

Answer Options	2 kW or less	>2 - 4 kW	>4 - 8 kW	>8 - 12 kW	>12 - 16 kW	>16 - 20 kW	>20 - 24 kW	Greater than 24 kW	Unsure	Average
Now	2 2%	5 4%	45 35%	25 19%	19 15%	11 8%	3 2%	5 4%	15 12%	10.41
In Two years	0 0%	3 2%	20 15%	29 22%	32 25%	16 12%	5 4%	6 5%	19 15%	12.80

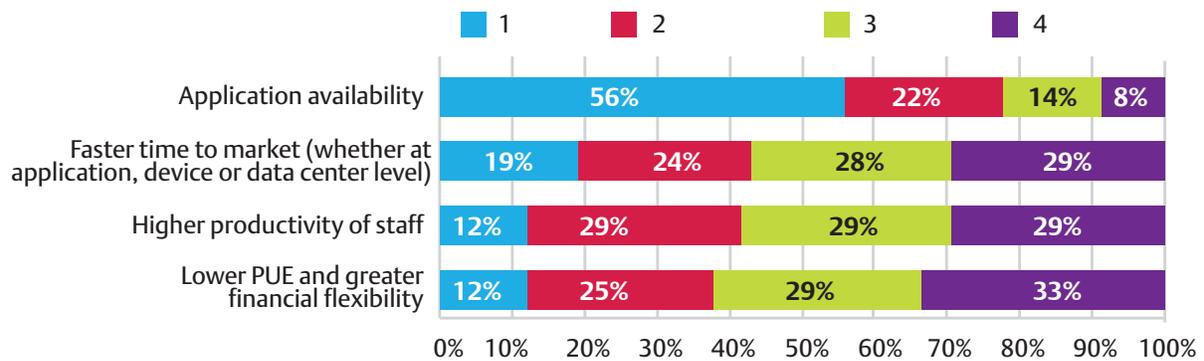
Maximum Power Density



Given the list below, what are you most concerned with accomplishing in your data center? Please rank the items from 1 to 4, with 1 being your biggest concern. Each number can only be used once.

Answer Options	1	2	3	4	Average
Application availability	73 56%	28 22%	18 14%	11 8%	1.75
Faster time to market (whether at the application, device or data center level)	25 19%	31 24%	36 28%	38 29%	2.67
Higher productivity of staff	16 12%	38 29%	38 29%	38 29%	2.75
Lower PUE and greater financial flexibility	16 12%	33 25%	38 29%	43 33%	2.83

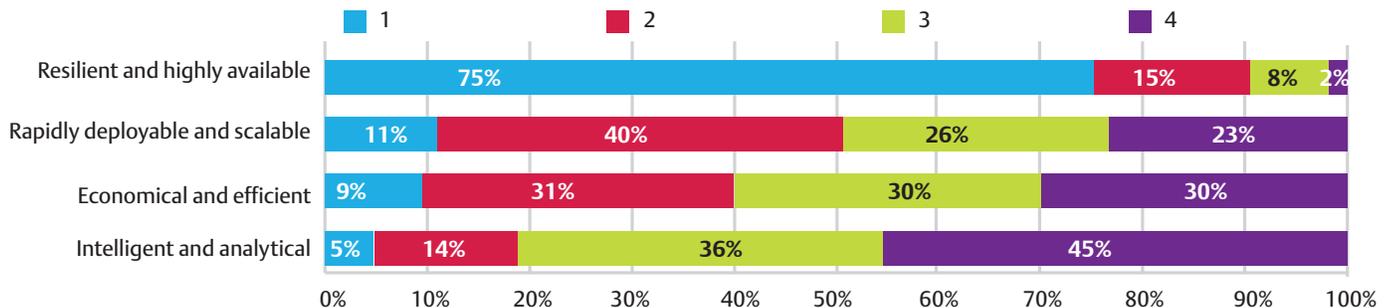
Most important to accomplish in Data Center



Given the list below, what data center capabilities are most important to you? Please rank the items 1 to 4, with 1 being the most important to you. Each number can only be used once.

Answer Options	1	2	3	4	Average
Resilient and highly available	98 75%	20 15%	10 8%	2 2%	1.35
Rapidly deployable and scalable	14 11%	52 40%	34 26%	30 23%	2.62
Economical and efficient	12 9%	40 31%	39 30%	39 30%	2.81
Intelligent and analytical	6 5%	18 14%	47 36%	59 45%	3.22

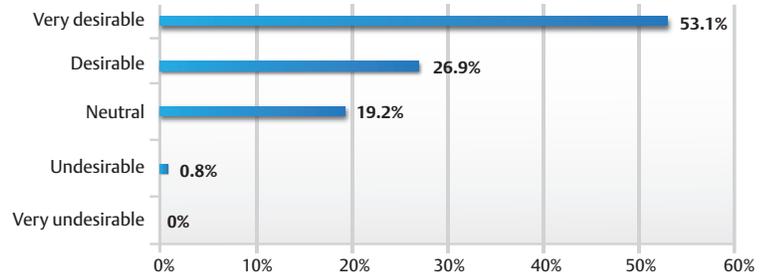
Most important Data Center Capabilities



How desirable is having virtualized infrastructure in your data center?

Answer Options	Response Percent	Response Count
Very desirable	53.1%	69
Desirable	26.9%	35
Neutral	19.2%	25
Undesirable	0.8%	1
Very undesirable	0.0%	0
	average	4.32

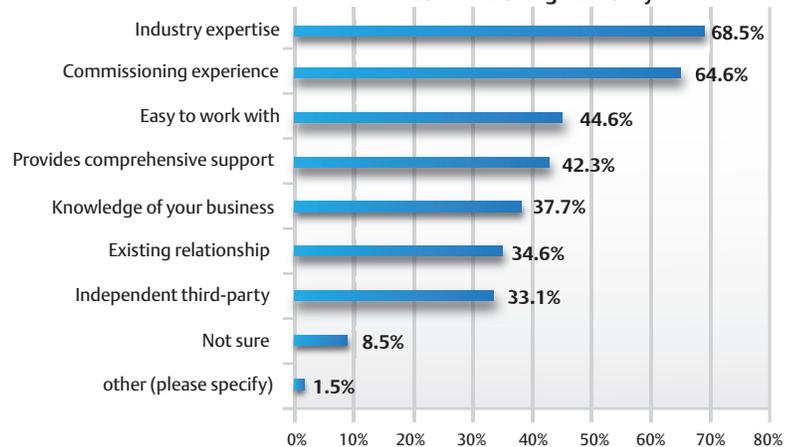
Desirability of Virtualized Infrastructure



What factors are most important when selecting a data center commissioning authority? Select all that apply.

Answer Options	Response Percent	Response Count
Industry expertise	68.5%	89
Commissioning experience	64.6%	84
Easy to work with	44.6%	58
Provides comprehensive support	42.3%	55
Knowledge of your business	37.7%	49
Existing relationship	34.6%	45
Independent third-party	33.1%	43
Not sure	8.5%	11
Other (please specify)	1.5%	2

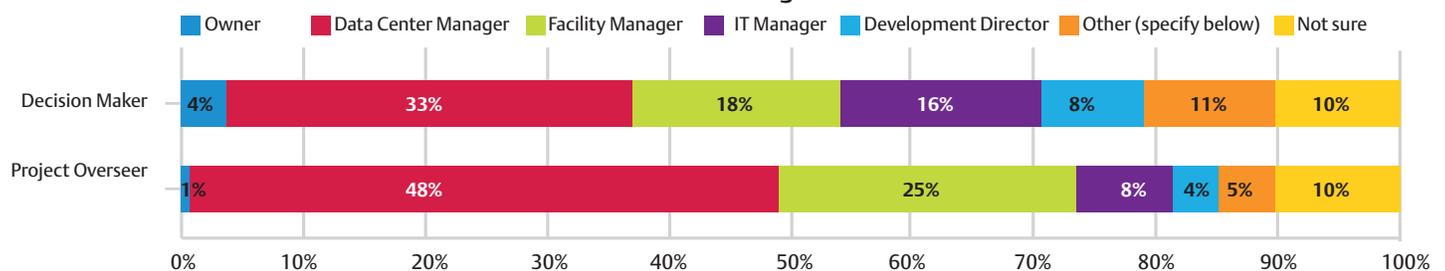
Most Important Factors When Selecting Commissioning Authority



What role/person in your organization would make the decision to use data center commissioning services and who would oversee the project?

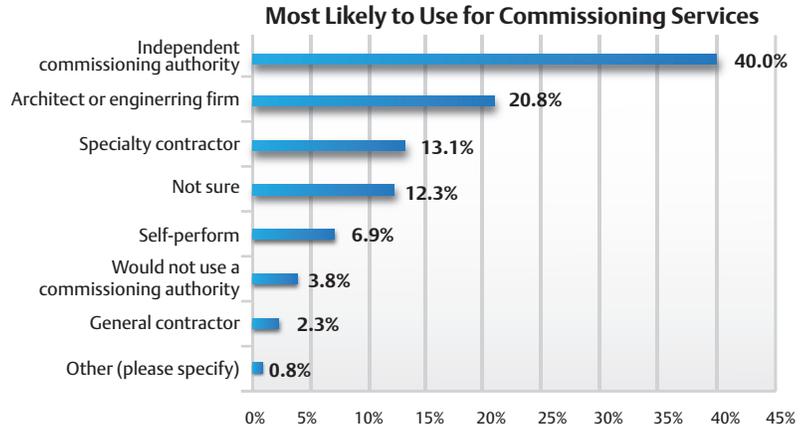
Answer Options	Owner	Data Center Manager	Facility Manager	IT Manager	Development Director	Other (specify below)	Not sure
Decision Maker	5 4%	43 33%	23 18%	21 16%	11 8%	14 11%	13 10%
Project Overseer	1 1%	63 48%	32 25%	10 8%	5 4%	6 5%	13 10%

Commissioning Services Roles



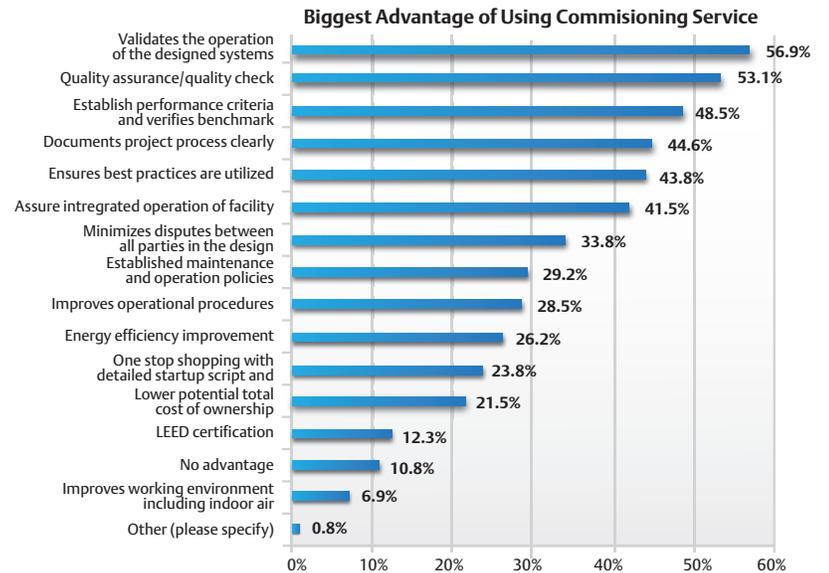
When selecting a commissioning authority for your data center project, who would you most likely use to perform the service?

Answer Options	Response Percent	Response Count
Independent commissioning authority	40.0%	52
Architect or engineering firm	20.8%	27
Specialty contractor	13.1%	17
Not sure	12.3%	16
Self-perform	6.9%	9
Would not use a commissioning authority	3.8%	5
General contractor	2.3%	3
Other (please specify)	0.8%	1



What do you see as the biggest advantages of using a data center commissioning service? Select all that apply.

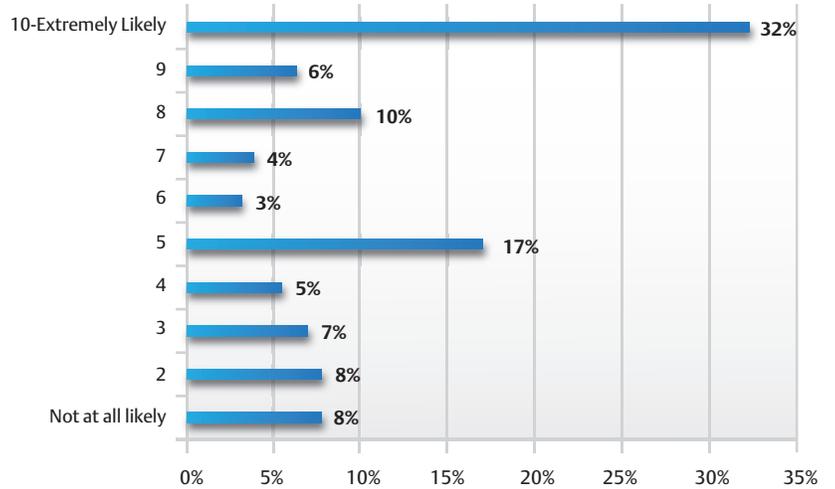
Answer Options	Response Percent	Response Count
Validates the operation of the designed systems	56.9%	74
Quality assurance/quality check	53.1%	69
Establish performance criteria and verifies benchmark goals	48.5%	63
Documents project process clearly	44.6%	58
Ensures best practices are utilized	43.8%	57
Assure integrated operation of facility	41.5%	54
Minimizes disputes between all parties in the design and construction process	33.8%	44
Establishes maintenance and operation policies	29.2%	38
Improves operational procedures	28.5%	37
Energy efficiency improvement	26.2%	34
One stop shopping with detailed startup script and testing along the way	23.8%	31
Lower potential total cost of ownership	21.5%	28
LEED certification	12.3%	16
No advantage	10.8%	14
Improves working environment including indoor air quality and lighting levels	6.9%	9
Other (please specify)	0.8%	1



How likely are you to incorporate commissioning services into your next data center project (new or expansion) on a scale from 1 to 10, with 1 meaning "Not at all likely" to 10 meaning "Extremely likely"?

Answer Options	Response Percent	Response Count
1 - Not at all Likely	8%	10
2	8%	10
3	7%	9
4	5%	7
5	17%	22
6	3%	4
7	4%	5
8	10%	13
9	6%	8
10 - Extremely Likely	32%	42
average		6.54

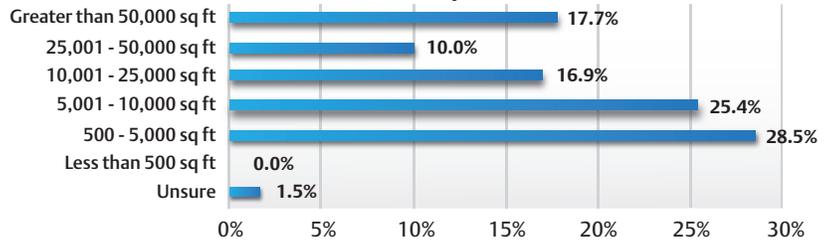
Likelihood of Using Commissioning Services



What is the square footage of your primary data center?

Answer Options	Response Percent	Response Count
Less than 500 sq ft	0.0%	0
500 – 5,000 sq ft	28.5%	37
5,001 – 10,000 sq ft	25.4%	33
10,001 – 25,000 sq ft	16.9%	22
25,001 – 50,000 sq ft	10.0%	13
Greater than 50,000 sq ft	17.7%	23
Unsure	1.5%	2

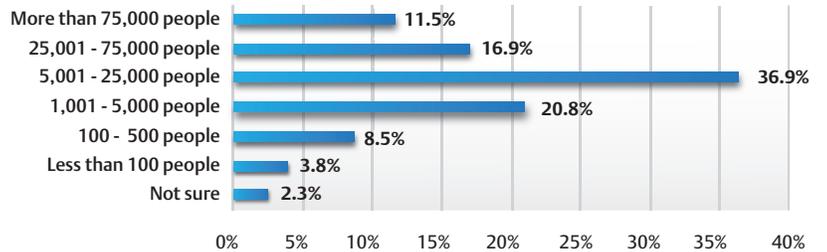
Primary Data Center Size



What is the worldwide headcount of your organization?

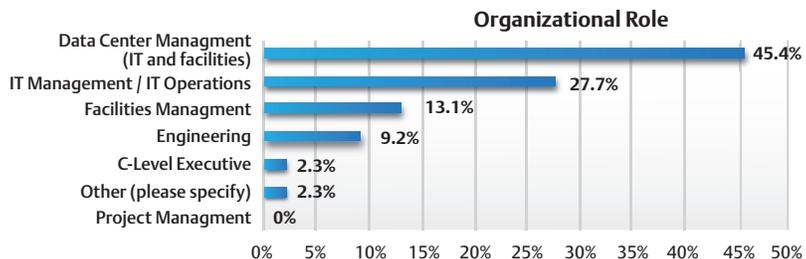
Answer Options	Response Percent	Response Count
Less than 100 people	3.8%	5
100 – 500 people	8.5%	11
1,001 – 5,000 people	20.8%	27
5,001 – 25,000 people	36.2%	47
25,001 – 75,000 people	16.9%	22
More than 75,000 people	11.5%	15
Not sure	2.3%	3
average		24918

Worldwide Headcount



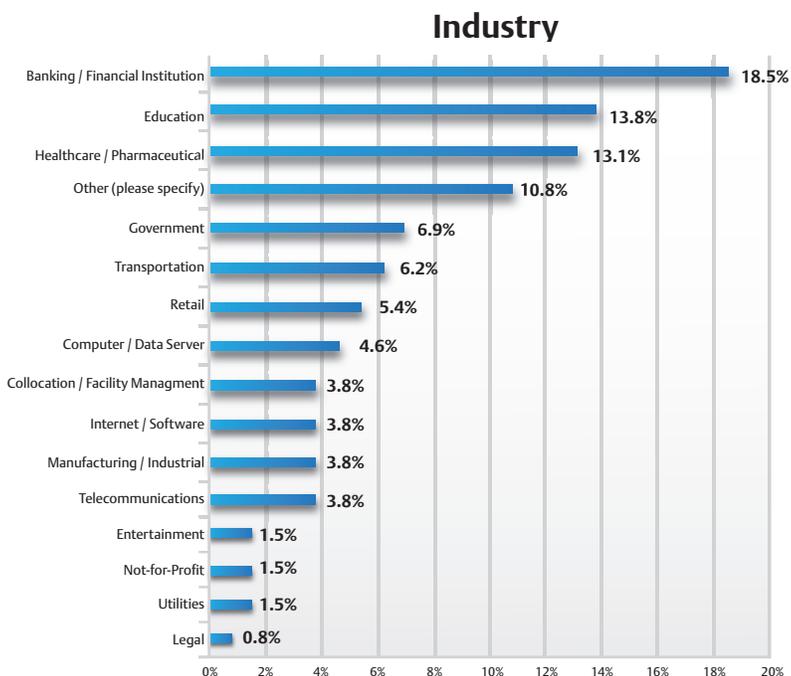
Which of the following best describes your functional role?

Answer Options	Response Percent	Response Count
Data Center Management (IT and Facilities responsibility)	45.4%	59
IT Management / IT Operations	27.7%	36
Facilities Management	13.1%	17
Engineering	9.2%	12
C-Level Executive	2.3%	3
Other (please specify)	2.3%	3
Project Management	0.0%	0



What best describes your organization's industry concentration or focus?

Answer Options	Response Percent	Response Count
Banking / Financial Institution	18.5%	24
Education	13.8%	18
Healthcare / Pharmaceutical	13.1%	17
Other (please specify)	10.8%	14
Government	6.9%	9
Transportation	6.2%	8
Retail	5.4%	7
Computer / Data Server	4.6%	6
Collocation / Facility Management	3.8%	5
Internet / Software	3.8%	5
Manufacturing / Industrial	3.8%	5
Telecommunications	3.8%	5
Entertainment	1.5%	2
Not-for-Profit	1.5%	2
Utilities	1.5%	2
Legal	0.8%	1



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