DCIM vendor Sunbird Software feeds on electrical data to find sweet results for datacenter operators

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The stand-alone DCIM software developer has deepened its feature set in electrical monitoring and capacity planning to lower risks and drive infrastructure economics. It has positioned its product as easy to buy, roll out and use, which resonates with datacenter operators that typically struggle with budgets and staffing.

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Introduction

Datacenter infrastructure management (DCIM) specialist Sunbird Software has rolled out multiple upgrades that focus on improved power capacity management and distributed edge sites with direct current equipment and has further improved usability for operations staff. The new releases play to Sunbird's areas strengths, and the company is betting that they will help it differentiate and win competitively now that DCIM is an established category.

451 TAKE

Just in the few years since its spinoff, Sunbird has carved out a sizable part of the market as a stand-alone DCIM vendor amid strong competition for conservative buyers on tight budgets. It has positioned its product as easy to buy, roll out and use, which resonates with many datacenter operators, which typically struggle not only with budgets but also with project resources and staffing, and often find DCIM integration overwhelming. Sunbird's direction of product development, which brings significant value for little effort, also makes good sense and should help the company both retain existing and win new customers. Sunbird's continued execution will likely reap its reward in the next couple of years while there is a large untapped opportunity at many enterprises and colocation providers.

Context

Sunbird was spun off after French electrical equipment maker Legrand acquired US-based datacenter equipment supplier Raritan in 2015. Raritan founder Ching-I Hsu is Sunbird's chairman and principal investor. Herman Chan, former general manager of Raritan's DCIM business, is Sunbird's president.

Since the spinoff, Sunbird has developed the intelligent rack PDU monitoring and DCIM tools it inherited from Raritan to become a successful pure play. One of the areas where Sunbird differentiates is with datacenter connectivity visualization and recommendations for optimal connections. Even though Sunbird retains commercial connections with Legrand's division for joint go-to-market initiatives, largely for intelligent (connected) rack power distribution units, it is hardware-vendor-agnostic – it has partnerships with others such as Chatsworth – and its software interoperates with a wide array of equipment from dozens of manufacturers.

Sunbird does not disclose financials but says it has grown steadily over the years, and that its total customer count is now more than 1,600, a 50% increase in about two years. We estimate that Sunbird has slightly more than 120 employees and revenue of $15-20m. Customers include Comcast, Activision, Disney+, Merck, KPMG and MacStadium.

Technology

Sunbird's flagship DCIM product is dcTrack for asset management and capacity planning, which includes what-if scenario planning and tracking of stranded power and cooling capacity. PowerIQ is its real-time power and environmental monitoring module. Sunbird has strong visualization features, including real-time thermal mapping and interactive 3-D white-space visualization (of assets, connections and the physical room). Sunbird applies a subscription-based licensing model by the number of assets under management – cabinets for dcTrack and per node (individual equipment) for PowerIQ, but for the sake of simplicity, Sunbird uses only cabinets when the two products are licensed in a bundle.

Over the years, Sunbird has invested in making its software easy to use to compete in what is an arguably oversupplied marketplace. In its pitches to datacenter facility operators, Sunbird focuses on the DCIM offering's ease of use, complete features and simple licensing. It says customers can get value out of its software quickly because integration is highly automated, and there is little customization needed to get started. Dashboards use HTML5 and are preconfigured with more than a hundred of the most common charts and reports for datacenter management. The software supports various bidirectional data connectors, too, to integrate with other management tools and business systems. Factory integration includes ServiceNow, BMC and VMware management tools.

Even if the ease-of-use claims are difficult to verify against competitive offerings, the messages fit with operators' pain points. A 2018 survey from 451 Research showed that a quarter of DCIM projects failed at the first attempt and about 10% failed completely. Even if the project is a success overall, costs exceeded budget in nearly half of the rollouts according to more than a third of DCIM user respondents. Another common problem, even if the rollout is technically a success, is demonstrating business value within the first year of deployment.

With Sunbird's recent updates, the company's direction of travel is ease of deployment and use. Probably the single biggest development came with its 7.0.1 (major) release, which added a new analysis engine to dynamically dial in power capacity allocated to IT systems and cabinets that reflects actual power use as opposed to static provisioning. The feature, called Auto Power Budget, automatically updates the value stored for allocated power for each device in the capacity management tool based on recent historical readings and policy settings. This should allow operators to reclaim power and cooling capacity that can be deployed for additional systems based on actual data rather than assumption.

Other recent feature upgrades include new alerting functions on electrical equipment. One of the novelties is three-phase imbalance alerting in PowerIQ, which notifies operators if any equipment in the chain of the power distribution is out of balance. Unequal load distribution between electrical phases results in unbalanced current flows, which result in voltage drops, which increases distribution losses and loss of capacity against the design load. Another addition is detailed current monitoring and customizable threshold, which customers can use to fine-tune settings for their own requirements to make their own safety margin and capacity management trade-offs. The operating staff gets real-time alerts if thresholds are exceeded.

Competition

Sunbird faces broad competition in the DCIM sector, including from the leading pure play, Nlyte Software, as well as specialists such as FNT, Maya HTT and Tuangru. Large datacenter equipment and service suppliers ABB, Eaton, Schneider Electric, Siemens and Vertiv are also DCIM rivals. There are more than 50 DCIM suppliers that contend in the DCIM space, ranging considerably in size and scope.

Additionally, some colocation providers have developed their own DCIM software, which they bundle into their core offerings or offer for a small cost. These include leading colo providers such as Equinix, as well as providers such as EdgeConneX, Etix Everywhere, ServerFarm and vXchnge.

A new development in the DCIM space involves DCIM-based cloud services known as datacenter management as a service (DMaaS), which is currently being offered by Eaton, Nlyte and Schneider.

SWOT Analysis

STRENGTHS
As a DCIM specialist, Sunbird is nimble and focused. Its software is user-friendly and now has many of the features of rival products.

WEAKNESSES
Sunbird remains a small company in an extremely competitive environment. It lacks the scale offered by larger rivals that some customers require.

OPPORTUNITIES
Most demand for DCIM today is from large enterprises and colocation providers. Suppliers that offer scalable and tailored features for these segments are best positioned to grow. Most datacenters today have yet to adopt DCIM.

THREATS
Large equipment makers that are also DCIM suppliers may compete aggressively on software pricing.