

Sun's Cancellation of UltraSPARC V Signals Shifting Vision

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Sun Microsystems has canceled UltraSPARC V, the planned major upgrade to high-end servers. Enterprises should seek details regarding the company's increasingly obscure product road map and its plans for throughput computing.

NEWS ANALYSIS

Event

On 12 April 2004, Sun executive David Yen responded to press reports that the company has canceled two UltraSPARC projects to focus on throughput computing and reduce development costs. Gartner believes that Sun will reduce an engineering design department of 1,600 by 20 percent and will reallocate some resources retained from the canceled Millennium (UltraSPARC V) and Gemini (low-power servers) projects to two other UltraSPARC projects, code-named Niagara and Rock.

Analysis

Sun has eliminated two UltraSPARC projects, partly for financial reasons and partly to rationalize its product road map. The original road map mandated that Sun would deliver Gemini for low-power consumption, network-facing or Web-intensive applications and Millennium for high-end computing-intensive applications. Now that the UltraSPARC V/Millennium project has been eliminated, the current architecture, UltraSPARC IV, will become the placeholder for high-performance systems until Rock appears in late 2006 or 2007. However, lack of specifications on Rock and the delay before its probable appearance create uncertainty around Sun's high-performance processor road map. Sun will offer UltraSparc IV+ in late 2005 as its high-performance product, expecting its performance advances to last through the release of Rock.

Even with enhancements planned for UltraSPARC IV+, Gartner believes that Sun faces many challenges in regaining the market standing it has lost since 2001. Aggressively priced low-end server vendors such as Dell and high-end servers from IBM and Hewlett-Packard (HP) have exerted market pressure. The revised Sun product road map envisions the UltraSPARC IV and IV+ as competitors to HP (PA-RISC 8800 and Itanium), IBM (Power) and other Intel Itanium servers, as well as the SPARC-compatible systems of Fujitsu Siemens Computers. Sun will back several different chip designs: UltraSPARC IV+; the secrecy-shrouded SPARC-based Niagara and Rock designs; and Intel X86/Opteron. Through 2Q05, Gartner believes Sun will be challenged to manage and rationalize:

- Maintaining the depth and consistency of product development through difficult economic conditions
- Rebuilding its competitive edge
- Quickly and productively reallocating resources
- Wringing leadership performance from UltraSPARC IV/IV+ against the new Itanium 2 and Power 5 designs
- Evaluating possible synergies between Sun and Fujitsu design teams to reduce SPARC expenses

Recommendations: Sun's current customers should demand details from Sun regarding the company's product road map, as well as further elaboration on its plans for implementing throughput computing. They should evaluate Sun's chip multithreading, as manifested by Niagara, as a technology for selected network-facing applications, but should be aware that the product will not necessarily deliver similar improvements for computing-intensive loads, as envisioned for the yet-to-be-released Rock. Customers should not assume Rock will fully substitute for the highly pipelined, out-of-order execution design of Millennium.

Analytical Sources: George Weiss, Martin Reynolds and Paul McGuckin, Gartner Research

Recommended Reading and Related Research

- "Sun Microsystems Seeks to Reinvent Itself" — Planners should consider nine important decision criteria to evaluate Sun's progress in regaining the initiative in technology markets. **By George Weiss**
- "Vendor Rating: Sun Microsystems Continues Fighting" — Sun has held its own in a down economy, but must clarify how it will advance overall revenue growth while maintaining its innovative edge. **By Daryl Plummer and others**

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