

AN IDC SPECIAL REPORT

# HPC Storage: A Software Perspective

## OVERVIEW

IDC believes that demand from HPC end users will drive top storage systems suppliers to create virtualized and then grid-based storage solutions that meet the needs of end users for increased efficiency, a solution to the management problems of storage area network (SAN) and network-attached storage (NAS) proliferation and the ever increasing need for storage capacity and better management of complexity of systems. User needs and supplier investments in advanced storage infrastructure will create markets for advanced storage systems in which both virtualized and grid-based storage capabilities help to address the shortcomings of SANs, as well as provide new means to improve costs and increase the flexibility of storage environments. Both the HPC market and the Storage markets are quite healthy and continuing to grow as demonstrated by IDC forecasts. In 2006, the technical market grew \$822 million to reach just over \$10 billion. IDC expects the total HPC market to expand by 9.1% annually in revenue to reach \$15.5 billion by 2011. IDC now estimates 2006 revenue for the worldwide storage software market to be \$9.8 billion. With expectations that customers will continue to invest strongly in various forms of storage software, IDC forecasts this market to increase to \$16.6 billion by 2011, representing an 11.2% compound annual growth rate (CAGR) from 2007 through 2011.

## OBJECTIVE

To provide a revenue forecast of spending by HPC end users on storage software -- File systems and storage management SW-- for their computing environment.

## METHODOLOGY

This report will provide a unique perspective on the market as it combines the analyst expertise and primary research data of the two primary IDC research groups, Enterprise Storage and Technical Computing. Information will include data on HPC end user spending on storage by WW region, size of system, clustered versus non-clustered and operating environment.

## BENEFITS

♦ Provides a specific perspective on the storage software-related requirements necessary for HPC users.

## DELIVERABLES

A 25+ page document will provide a revenue forecast of spending by HPC end users on storage software -- File systems and other storage software -- for their computing environment. Information will include data on HPC end user spending on storage by WW region, vertical or application, size of system, clustered versus non-clustered and operating environment. This report will provide a unique perspective on the market it combines the analyst expertise and primary resarhc data of the two primary IDC research groups, Enterprise Storage and Technical Computing.

## DELIVERY DATE

September 2007

## MEET THE EXPERTS



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