Software-Defined Converged and Hyperconverged Infrastructure

AN IDC CONTINUOUS INTELLIGENCE SERVICE

IDC's *Software-Defined Converged and Hyperconverged Infrastructure* service provides coverage of developing technologies, use cases, emerging vendors, business models, buyer case studies, and market estimates for software-defined infrastructure (SDI). SDI is made up of three key submarkets: software-defined compute (including virtualization and containerization), software-defined storage (which includes block, file, object, and hyperconverged), and software-defined networking. This service is also a companion for IDC's Quarterly Converged Systems and Semiannual Software-Defined Infrastructure Software Trackers. The demand for software-defined and converged systems (including integrated infrastructure, hyperconverged, and composable infrastructure) is being driven by strong demand from both enterprises and cloud providers of all sizes. Clients will benefit from a comprehensive and holistic view of these composite markets.

Markets and Subjects Analyzed

- Converged infrastructure (CI) primary market segments: integrated and hyperconverged (II/HCI) infrastructure and composable infrastructure (CDI)
- Software-defined infrastructure systems, platforms, and enabling technologies including server-based storage (SBS)

- High bandwidth, ultralow-latency fabrics, and interconnects
- Software-based virtualization platforms
- Function-offload accelerators (SmartNICs)

Core Research

- Software-Defined Infrastructure Systems, Platforms, and Enabling Technologies Market Trends and Outlook
- Converged Infrastructure Market Trends and Outlook, including Integrated Infrastructure (II) and Hyperconverged Infrastructure (HCI)
- Composable Infrastructure (CDI) Market Trends and Outlook, including the use of Function-Offload Accelerators (SmartNICs)

- Use of SDI, CI and HCI, and CDI systems for Building Dedicated and Shared Cloud Infrastructure
- Profiles of Incumbent, New, and Emerging SDI, CI and HCI, and CDI Suppliers
- Solutions Specific to Performance-Intensive Computing and Mission-Critical Enterprise Workloads and Use Cases

In addition to the insight provided in this service, IDC may conduct research on specific topics or emerging market segments via research offerings that require additional IDC funding and client investment. To learn more about the analysts and published research, please visit: Software-Defined Converged and Hyperconverged Infrastructure.

Key Questions Answered

1. What are the key trends on enterprise and cloud provider customers adoption of SDI and CI on technology refresh and for new workloads?
2. What are the main factors driving organizations' investments in SDI/CI?
3. Which workloads are being commonly moved to SDI/CI, and which are staying on other architectures and why?
4. What is the storage revenue and capacity by SDS data organization, operating mode, and delivery models?
5. What are some of the computing (hardware disaggregation) market trends?
6. What capabilities and functional requirements are shaping vendor investments in SDI/CI as well as the key submarkets (storage, compute, and networking)?
7. How will the ecosystem evolve to enable the maximization of value for SDI/CI?
8. What role is open source software and standards playing in the development of the SDI market?
9. What are emerging trends in the CI submarkets: integrated, hyperconverged, and composable infrastructure?
10. What are some of the newer consumption models (like flexible and as-a-service consumption)?

Companies Analyzed

This service reviews the strategies, market positioning, and future direction of several providers in the storage market, including:

Cisco, DDN, Dell Technologies (EMC), Hewlett Packard Enterprise (HPE), IBM, Inspur, Lenovo, Microsoft, Nutanix, Pivot3, Quanta, Rackspace, Red Hat, Scality, Supermicro, SUSE, and VMware.