

# HPC and AI Infrastructure Index

---

IDC's *HPC and AI Infrastructure Index* (HAI) provides a comprehensive view of the infrastructure market for modeling and simulation (M&S) aka high-performance computing (HPC) and artificial intelligence (AI), both classified as performance-intensive computing (composite) workloads by IDC. HAI will provide historical and forecast revenue (and capacity and units where available) for infrastructure hardware, software, and cloud services markets and associated segments. It will also provide a view of vendor shares for selected market segments (IDC will rely on primary research and vendor guidance where available) to produce this data.

---

## MARKETS AND SUBJECTS ANALYZED

- Infrastructure for AI and M&S composite workloads.
- Segments include compute and storage infrastructure hardware, software, and cloud services

Note: The HAI market model will be aligned with IDC data products (e.g., Enterprise Infrastructure Tracker, Cloud IT Infrastructure Tracker, and the Public Cloud Services Tracker) and research publications (e.g., AI and Generative AI Infrastructure Stacks and Deployments, HPC Infrastructure Stacks and Deployments).

---

## CORE RESEARCH

- Market Model (Microsoft Excel)
- Summary and Key Highlights (Microsoft PowerPoint)

Notes:

- Market model updated annually. Data aligned to the delivery schedule for IDC data products (e.g., trackers) that are being used as the source for this model. Delivery schedule will vary from year to year.
- Limited data posted on [idc.com](http://idc.com). Full data sets delivered to subscribers directly.
- Subscribers get unlimited access to analysts for inquiries (provided the inquiry falls within the purview of the data being delivered).
- Additional deliverables, updates (semiannual or quarterly), and custom segmentation available upon request and may require additional fees.

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: [HPC and AI Infrastructure Index](#).

---

## KEY QUESTIONS ANSWERED

1. How large is the current market for HPC and AI infrastructure? What is the various hardware, software, and cloud services segments? Who are the key vendors and providers?
  2. How fast are these markets projected to grow? What are the projections for the various segments?
  3. How will major trends (e.g., Flash storage, distributed or parallel file systems, accelerated computing, ultra-low latency high-bandwidth interconnects) influence this market?
  4. How will convergence of infrastructure approaches play a role in the relative growth of these markets?
- 

## COMPANIES ANALYZED

This service reviews the strategies, market positioning, and future direction of several providers in the HPC and AI Infrastructure Index market, including:

Akamai, Alibaba, Alphabet (Google), Amazon (Amazon Web Services), Baidu, Cisco, Data Direct Networks (DDN), Dell, Hitachi

Vantara, HPE, Huawei, IBM, IEIT Systems (Inspur), Lenovo, Microsoft, Pure Storage, VAST Data, Weka IO, and Xfusion.