

# Data Center Compute Intelligence Service

## Part of the Cloud & Data Center Service Area Package

Global in-depth coverage of data center compute equipment used by enterprises, cloud, and telecom providers

“

We are seeing an increasing level of customizations on the server hardware based on the workload being deployed. Application specific co-processors have become mainstream, and even the CPUs are becoming more heterogeneous than ever before. The next few years are exciting for the server market.”

**Manoj Sukumaran**

Principal Analyst

# Data Center Compute Intelligence Service

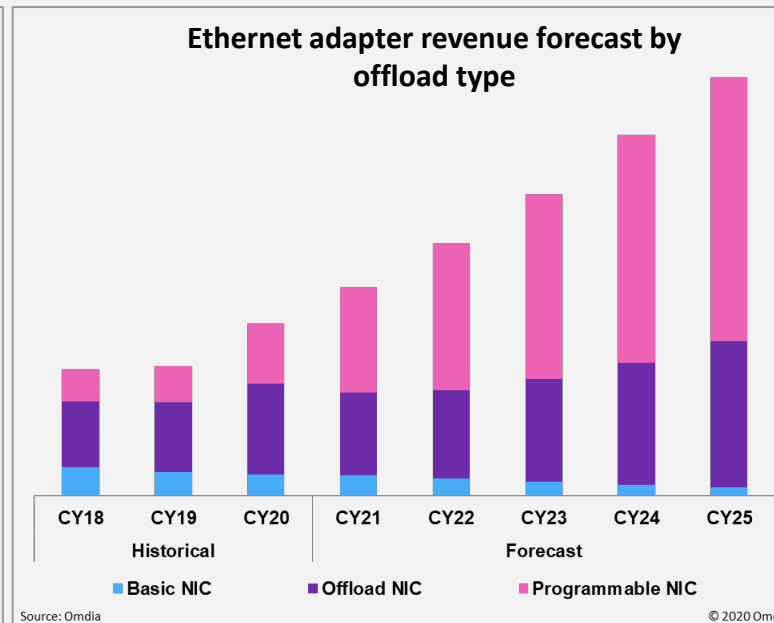
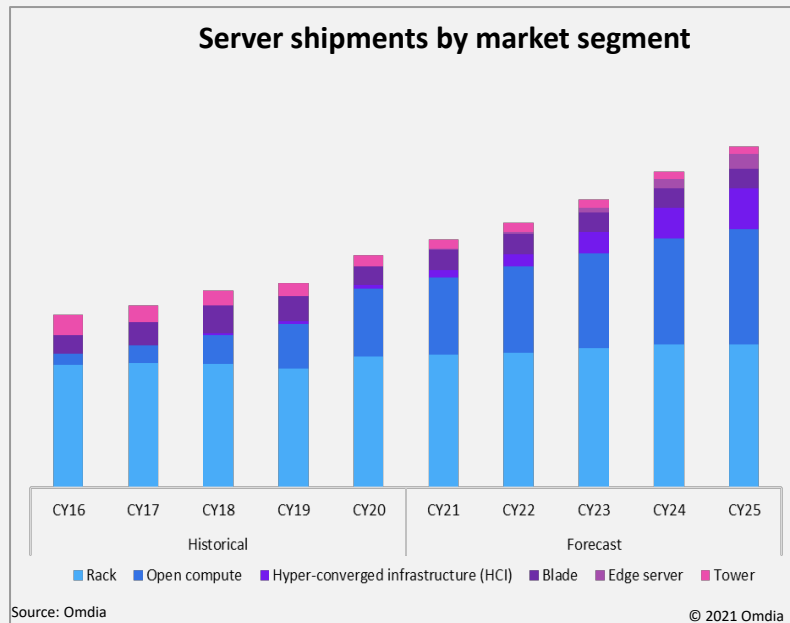
Part of the Cloud & Data Center Service Area Package

## KEY QUESTIONS ADDRESSED

- What are the technology transitions in the server market?
- How are enterprises, cloud and telecom providers deploying compute at the edge?
- What CPU and co-processor types deployed in servers today and are required going forward?
- What is the adoption rate of open computing?

## HOW OMDIA HELPS YOU

- Understand server and server connectivity market shipment and revenue growth
- Understand silicon attach rate for artificial intelligence workloads
- Adoption of CPU architecture: x86, Arm, RISC-V etc.
- Follow transition to white box servers
- Get perspective on adoption of open compute project (OCP) servers and network adapters
- Better understanding of migration of compute to the edge
- Get perspective on market adoption of programmable network interface cards (NIC)
- Correlate port shipments across DC IT infrastructure (servers, network, storage)



## NEW ENHANCEMENTS

- Server workload forecast
- Market specific trends (vRAN/O-RAN)
- Addition of ethernet controllers in server connectivity tracker
- Silicon level analysis of programmable Ethernet adapters

# Data Center Compute Intelligence Service: Our Experts

**Vlad Galabov**  
**Research Director**

- Open computing
- Hyperscale cloud service providers
- Semiconductor development

**Roy Illsley**  
**Chief Analyst**

- IT operations
- Application delivery
- Disruptive software technologies

**Moises Levy**  
**Principal Analyst**

- Power and cooling
- Energy efficiency
- Data center sustainability

**Alan Howard**  
**Principal Analyst**

- Colocation services
- Data center investment
- Location & construction strategies

**Manoj Sukumaran**  
**Principal Analyst**

- Compute systems
- Data center networks
- Disruptive hardware technologies

**Dennis Hahn**  
**Principal Analyst**

- Storage systems
- Data management
- Software-defined storage

**Vijendra Krishnamurthy**  
**Senior Analyst**

- Data center racks
- Rack power distribution
- Micro data centers

**Dominika Koncewicz**  
**Senior Analyst**

- SD-WAN platforms
- SASE & SD-WANaaS
- network service consolidation

**Nicole Tuggle**  
**Research Analyst**

- rPDU vendor share
- UPS hardware & service vendor share

**Keith Kirkpatrick**  
**Principal Analyst**

- Quantum computing
- High performance computing

**Currently Recruiting**  
**Principal Analyst**

- Kubernetes
- Cloud native software development

**Currently Recruiting**  
**Senior Analyst**

- Cloud services
- Data center buildout

# Data Center Compute: Deliverables



## MARKET TRACKERS

—Quarterly—

- Data Center Server Market Tracker
- Server Connectivity Market Tracker



New

## SURVEYS & REPORTS

—Annual—

- Of North American enterprises on data center compute strategies
- Data Center Compute at the Edge
  - Server Workload Forecast



## ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.



## BRIEFINGS

—Biannual—

Biannual scheduled briefings with analysts on research highlights from all aspects of the market.



## ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique questions.

# Data Center Compute: Market Trackers

## Data Center Server Equipment Market Tracker

Worldwide and regional market size, share, forecasts, and analysis for servers by form factor, server class, market segment, CPU type, and co-processor

### DETAILS

**Frequency:** Quarterly

#### Measures

- Vendor market shares
- Revenues
- Units
- Ports
- Revenue per unit

#### Regions

- Worldwide
- North America (US and Canada)
- Europe, the Middle East, Africa
- Caribbean and Latin America (including Mexico)
- Asia Pacific (including Japan and Australia)

#### Sub regions

- Mainland China and Rest of Asia Pacific

### COVERAGE

#### Data center server equipment

- Form factor
  - Rack [branded, white box]
  - Blade [shared resource, density optimized]
  - Open compute
  - Tower
  - Edge server form factor
- Servers by Location
  - Edge, Non-edge
- Market segment
  - Hyperscale CSP, tier 2 CSP, telco, enterprise
- CPU attach (x86, ARM, PowerPC, etc.)
- Co-processor attach (GPGPU, FPGA, etc.)
- Server class
  - entry-level, mid-level, large-scale, mainframe, high-performance compute

## Server Connectivity Market Tracker

Worldwide and regional market size, share, forecasts, and analysis for Ethernet network adapters by speed, CPU offload, form factor, use case, and market segment

### DETAILS

**Frequency:** Quarterly

#### Measures

- Vendor market shares
- Revenues
- Ports
- Revenue per port

#### Regions

- Worldwide
- North America (US and Canada)
- Europe, the Middle East, Africa
- Caribbean and Latin America (including Mexico)
- Asia Pacific (including Japan and Australia)

#### Ethernet network adapters

- Speed
  - 1GE, 10GE, 25GE, 40GE, 50GE, 100GE, 200GE
- CPU offload
  - Basic NIC
  - Offload NIC
  - Programmable NIC
- Form factor
  - Open compute
  - Stand up
  - Piggyback
- Market segment
  - Cloud Service Provider
  - Telco
  - Enterprise

# Related Content: Cloud & Data Center Service Area Coverage



## Service Area Package: **Cloud & Data Center**

SD-WAN Platforms  
Intelligence Service

Data Center Compute  
Intelligence Service

Cloud-Native Software Development  
Intelligence Service

Data Center Storage  
Intelligence Service

IT Operations  
Intelligence Service

Data Center Networks &  
Automation Intelligence Service

Cloud and Colocation Services  
Intelligence Service

Uninterruptible Power Supplies  
Intelligence Service

DC Thermal Management and  
Sustainability Intelligence Service

Data Center Rack Systems  
Intelligence Service

## About Omdia's Cloud & Data Center Research

Omdia provides deep analysis of worldwide compute technologies – from cloud to the edge. Detailed and data-rich intelligence services cover all aspects of data center IT and physical infrastructure, software, cloud & colocation services, and the strategies required to manage the entire IT ecosystem.

Omdia's expert team of cloud and data center analysts provide strategic guidance, steeped in a robust foundation of data, to both vendors and technology decision makers. Omdia has consistently been 1<sup>st</sup> to market capturing market disruptions and technology transitions, helping IT decision makers and their vendors succeed in navigating these transitions. For technology decision makers, Omdia also provides guidance on vendor selection and best practices for management of IT operations.

The Cloud & Data Center team provides market analysis in the form of quarterly datasets with size, share and forecasts, end-user surveys, vendor assessments and personalized consulting.

# Comprehensive data, insights & advice

## New in 2022

Cloud Native Software Development

Worldwide Data Growth Forecast

High Performance Computing

Data Center Sustainability Framework, Strategies, Incentives and Investment

Thermal Management Strategies

## New in 2021

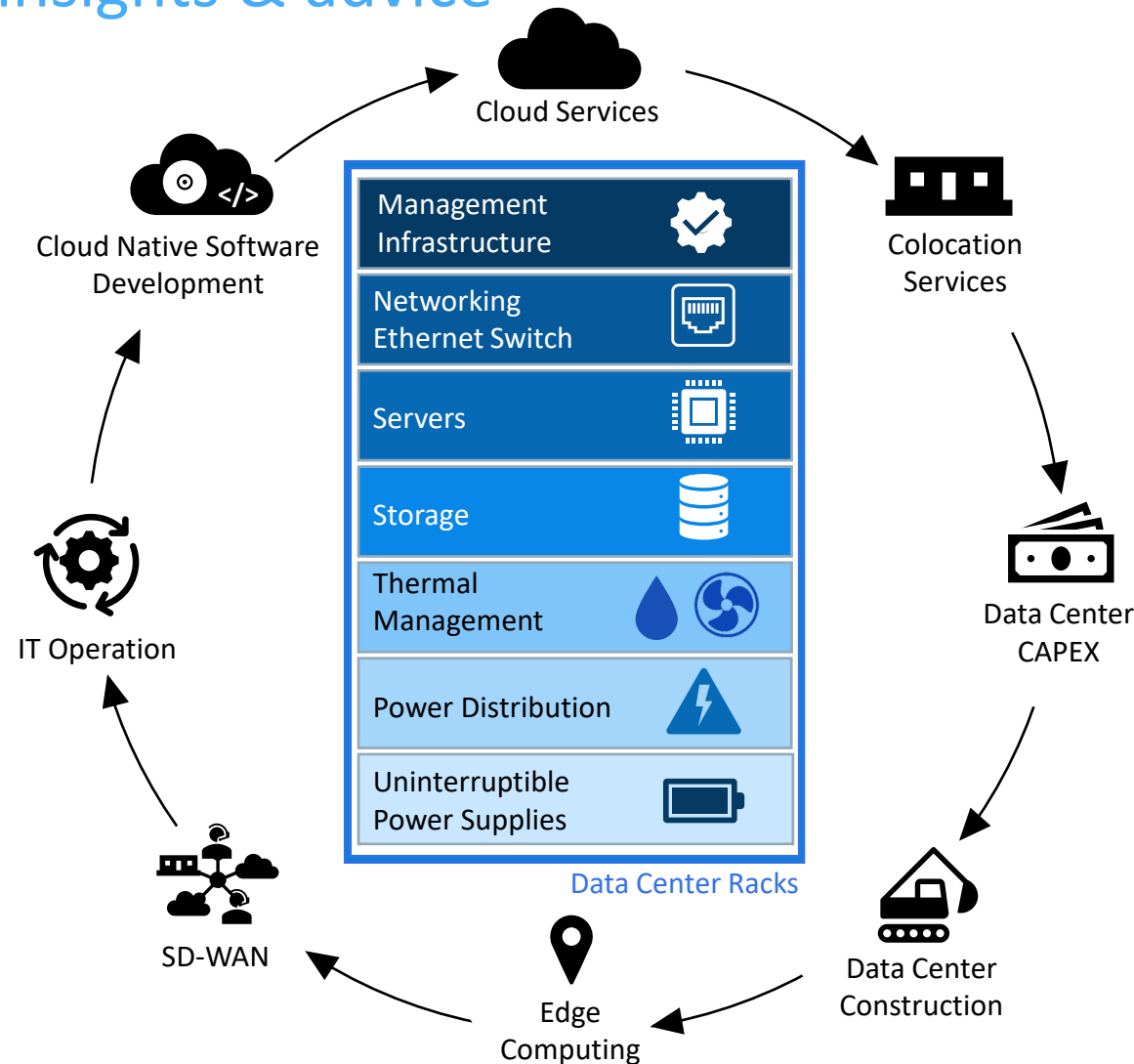
Server Workload Forecast

Data Center Sustainability

Smart Grid UPS

Infrastructure Management

Cloud Storage



## Old but Gold

Hyperscale Cloud Service Providers

Server CPU transitions

Heterogeneous Compute  
SmartNICs, AI Accelerators, GPUs

Open Computing

Servers in the telecom network

AI Ops and Cloud Ops

SD-WAN

Data Center Buildings Tracker

UPS Markets and Architectures

Edge computing and micro DCs

# Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

## Draw on our expertise

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:



**Tom Coate**  
Customer Success  
Manager



**Kâren Dyer**  
Customer Success  
Manager





## CONNECT WITH US

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### ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio\*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

\* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.