Service Provider Infrastructure Supply Chain

IDC's *Service Provider Infrastructure Supply Chain* program encompasses service provider compute and storage infrastructure, including supply chain strategies, deployment methods, and available technologies. Supplementing IDC's broad and deep quantitative portfolio surrounding this buyer segment, this service examines the supplier competitive landscape, forecasts future demand, and profiles different types of suppliers in the service provider infrastructure market segment, including ODMs, OEMs, component suppliers, systems integrators, and other infrastructure partners. This service is a syndicated research companion to IDC's Cloud Infrastructure Index (CII 100) research, Worldwide Quarterly Computing Platforms and Storage ODM Direct Tracker®, and the Enterprise Infrastructure: Buyer and Cloud Deployment Tracker.

MARKETS AND SUBJECTS ANALYZED

- Worldwide compute and storage cloud infrastructure market share, forecasts, and installed base
- Cloud, hyperscale, and service provider infrastructures
- Service provider infrastructure tiers
- Open source and open infrastructure communities
- Evolving supply chain for service providers
- Cloud to edge deployments
- Software-defined infrastructure
- Datacenter infrastructure technology development (liquid cooling, etc.)
- Software-based infrastructure resilience for cloud applications
- Public cloud infrastructure stacks
- Infrastructure as a service for service providers
- Vendor performance, strategies, and portfolios
- The role of operating systems in cloud computing
- The impact of virtualization, containers, and cluster/grid computing on service provider infrastructure deployments
- CPU and accelerated computing vendors' evolution, road map, and market share in the cloud segment
- Worldwide ODM Direct AI system vendor and solution market share and forecasts
- SmartNICs, DPUs, and other function offload accelerators

CORE RESEARCH

- ODM Direct and Supply Chain Compute and Storage Infrastructure Taxonomy
- ODM Direct Infrastructure Market Shares
- ODM Direct Infrastructure Forecast
- ODM Direct Supplier and Demand Trends
- Emerging Technologies, Standards, and Communities That Influence Service Provider Infrastructure (e.g., Open Compute Project and Computex)
- Datacenter Infrastructure Technology Development (e.g., Liquid Cooling)
- Content Delivery Network Infrastructure

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: Service Provider Infrastructure Supply Chain.

KEY QUESTIONS ANSWERED

1. How will public clouds, service providers, and hyperscalers shape the infrastructure market in the future?
2. How will emerging compute and storage technologies impact the market, and how will they be adopted in cloud, telecom, and managed services offerings?
3. How will performance-intensive computing change public cloud?
4. How will service providers address high-end and mission-critical workloads with their infrastructure strategies?
5. What are the next set of trends in infrastructure abstraction for the cloud: virtualization, containerization, clustering, and composability?

COMPANIES ANALYZED

This service reviews the strategies, market positioning, and future direction of suppliers in the service provider infrastructure market:

Acer Group, Achronix Semiconductor, ADLINK, Advantech, AIC, Altera, AMAX, AMD, Ampere, ARM, Arrow Electronics, ASRock Rack, ASUS, Atos, Avnet, Broadcom, Canonical, CDW, Celestica, Cisco, Citrix, Compal, Cray, D&H Distributing, Dell Technologies, DEPO Computers, Docker, Ericsson, Exertis, Flex Logix, Foxconn, Fujitsu, Fungible, GIGABYTE, GlobalFoundries, Groupe Bull, Hewlett Packard Enterprise, Hikvision, Hitachi, Huawei, Hyve Solutions, IBM, IEIT Systems, Ingram Micro, Inspur Power Systems, Intel, Inventec, Kalray, Lattice Semiconductor, Lenovo, Lenovo NetApp Technology, Marvell Technology Group, MediaTek, Mellanox Technologies, Mesosphere, Microchip Technology, Micron Technology, Microsoft, MiTAC, MSI, NEC, NetApp, Nettrix, New H3C Group, Nokia, Nutanix, NVIDIA, NXP Semiconductors, Oracle, Pegatron, Penguin Solutions, Pensando, Powerleader, Pure Storage, Qualcomm, Quanta, QuickLogic, Red Hat, Samsung, SanDisk, Schneider Electric, Seagate, SHI International, SK Hynix, SMIC , STMicroelectronics, Stratus, Sugon, Super Micro, SUSE, SYNNEX, Tech Data, Texas Instruments, Tongfang, Toshiba, Tower Semiconductor, TSMC , UMC , Unisys, Vertiv, VMware, Westcon-Comstor, Western Digital, Wipro, Wistron, Wiwynn, xFusion Digital Technologies, Xilinx, Yadro, and ZTE.