



HYPERION RESEARCH

Some Perspectives on HPC in Europe

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www.HyperionResearch.com
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European HPC Perspectives

Total EU HPC revenue growing ahead of market at 7.9%

HPC Server (€M)	2019	2020	2021
North America	5,324	4,719	5,424
EMEA	3,368	3,207	3,604
APAC w/o Japan	2,102	2,168	2,810
Japan	649	1,478	781
ROW	189	193	224
Total	11,631	11,765	12,843

- **HPC Server 2021 demand/consumption**
 - EMEA ~ 28.1% of the global server market
 - EU ~ 80% of European consumption
- **EU growth in the worldwide HPC market projected to grow at a CAGR of 7.9% between 2021-2026, ahead of the overall market CAGR of 6.9%**

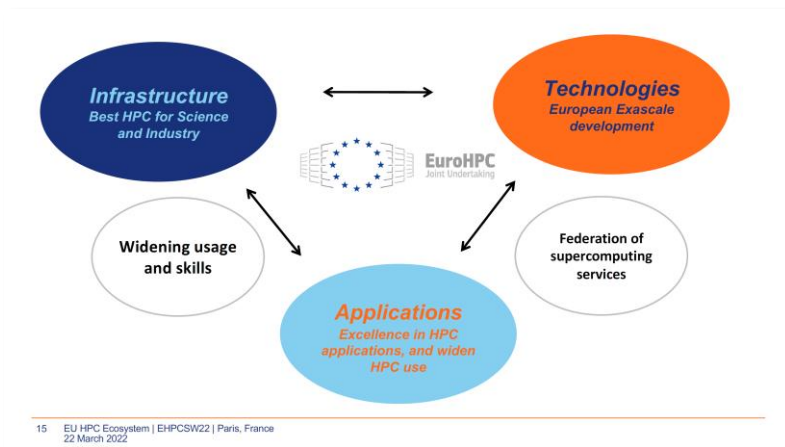
European HPC Perspectives



EuroHPC
Joint Undertaking

Broad-based progress with EuroHPC JU leadership

- **Public/private funding up to €7B through 2027**
- **Strategic Pillar strategy**
 - Technologies
 - Infrastructure
 - Applications
 - Federation, Usage, Skillsets
- **Top HPC installations:**
 - Five petascale
 - Three pre-exascale
- **Multiple calls open to support 4-pillar strategy**
- **Develop new quantum computing ecosystem**
- **EPI and SiPearl progress**
- **SAGE 2 complete and transitioning to IO-Sea**
- **Pan-European EUMasters4HPC program**



15 EU HPC Ecosystem | EHPCSW22 | Paris, France
22 March 2022

European HPC Perspectives

Other activity bodes well for HPC in Europe

- **UK HPC**
 - Archer 2
 - #22 on Nov 2021 Top500
 - UKRI, EPCC, the University of Edinburgh
 - Cambridge-1
 - Business and academic research focused on health and life sciences
 - NVIDIA datacenter
- **Intel investment in fab capacity**
 - Ireland
 - Germany

PLEASE SHARE YOUR
THOUGHTS!



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Our ISC22 Briefing Agenda

All registered attendees will receive the slide deck

- **Market Update and Forecasts**
- **Some Perspectives on European HPC**
- **Sustainability: No Longer a "Nice to Have"**
- **HPC and AI Talent Challenges**
- **Exascale Update**
- **Cloud Update**
- **Quantum Update**
- **AI Update**
- **Update on Storage & Interconnects**
- **Conclusions and Wrap-up**