

HPC Site Budget Allocation Map: Budget Expectations

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EXECUTIVE SUMMARY

Intersect360 Research surveyed the High Performance Computing (HPC) user community to complete its eleventh Site Budget Allocation Map, a look at how HPC sites divide and spend their budgets. We surveyed users on their spending in seven top-level categories: hardware, software, facilities, staffing, services, cloud/utility/outsourcing computing, and other. Each category was further divided into constituent subcategories, resulting in 27 unique items included in the analysis. Additionally, the respondents were asked about their future budget expectations

This report examines the change in budget from the prior year, expected budget change over the next year, and key areas in which users see significant changes occurring over the next year.

In 2018, most budgets either increased (46%) or remained the same (38%) from the prior year. Only a small percentage (16%) reported a decrease in their budgets. Commercial sites reported the strongest growth with academic and government reporting more modest growth from the prior year.

Outlook for future budget increases remains positive with a bit of slowing from last year, primarily at academic sites and in EMEA. About 51% of all respondents expect their budgets to increase by 1% or more over the next year, compared to 62% in 2017. For all responses, the average estimated increase based on the midpoint is 2.8%.

Our Budget Map survey results can be found in multiple reports, including the following:

- *HPC Site Budget Allocation Map: Industry Averages*
- *HPC Site Budget Allocation Map: Machine Learning's Impact on HPC Budgets*

TECHNOLOGIES COVERED IN THIS REPORT

- HPC system elements
- Storage elements
- Software elements
- Facilities-level technologies
- Services
- Cloud computing, grid computing, utility computing

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