

Market Information

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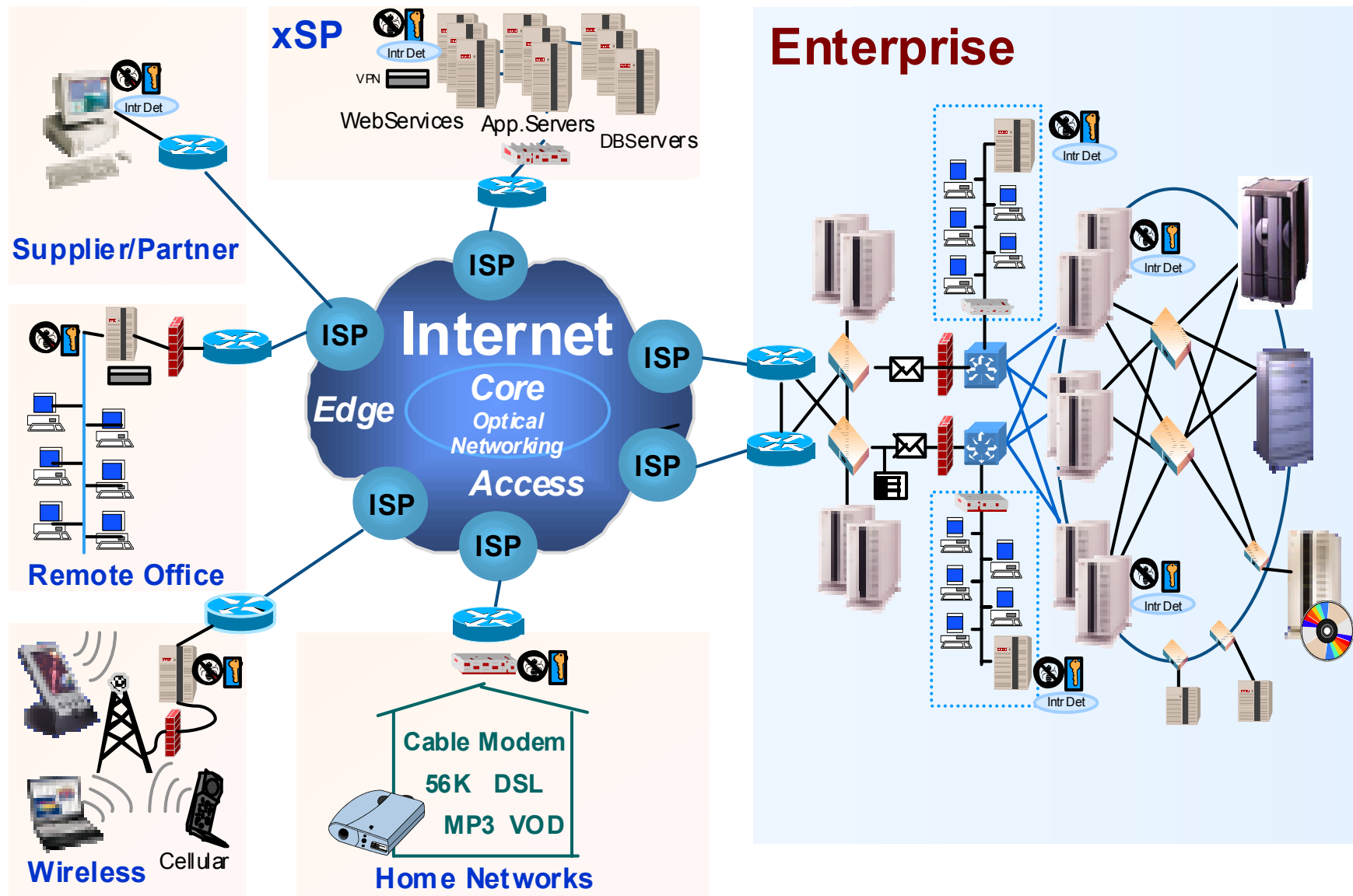
509-995-5939

Wildwood Associates IEEE 802 CFI 16MAR2004

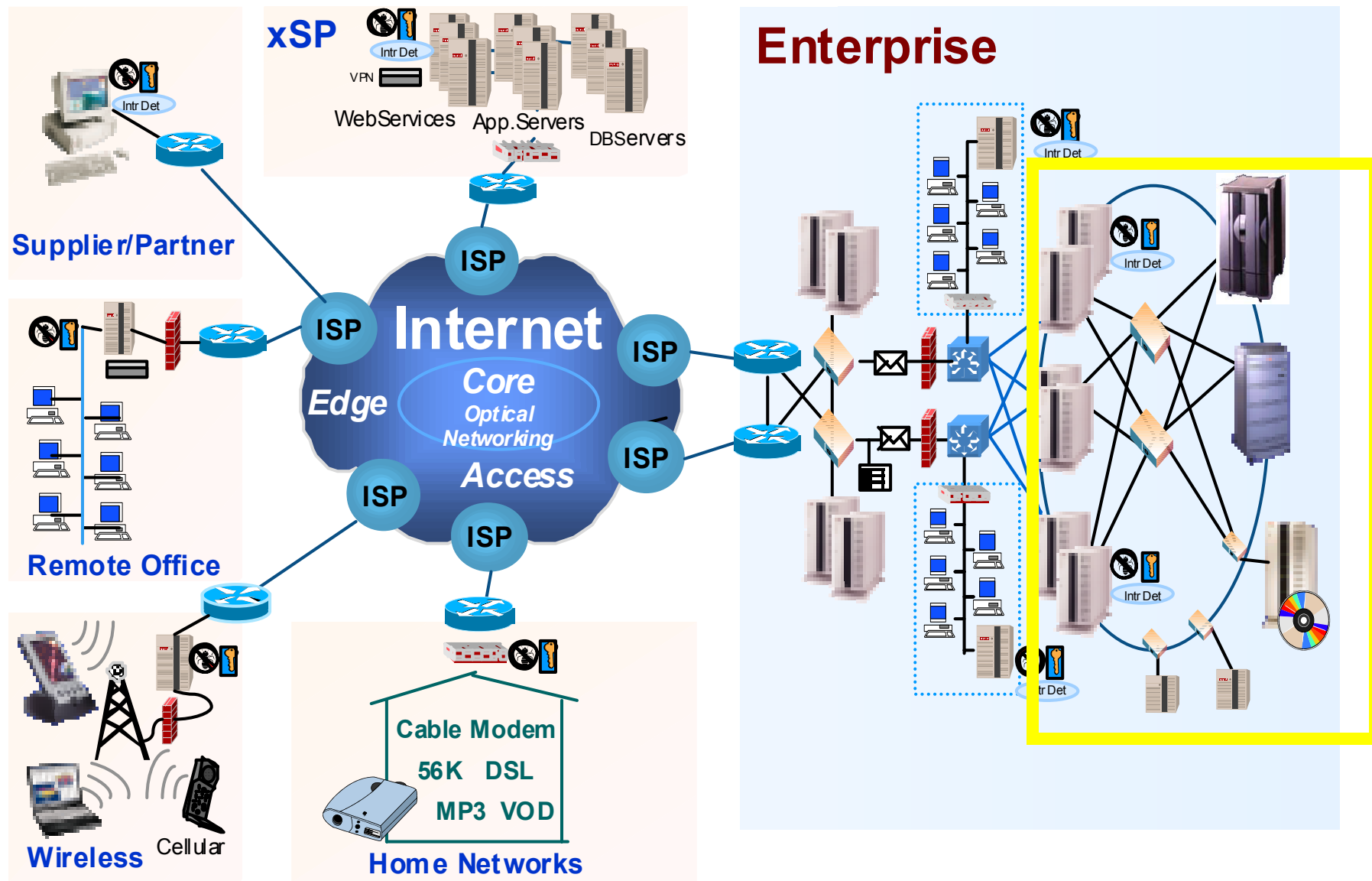
Sources

- IDC - Server Group
 - Gopal Hegde of Intel Storage Group - IDC
- IMEX Research
- Cluster vendors

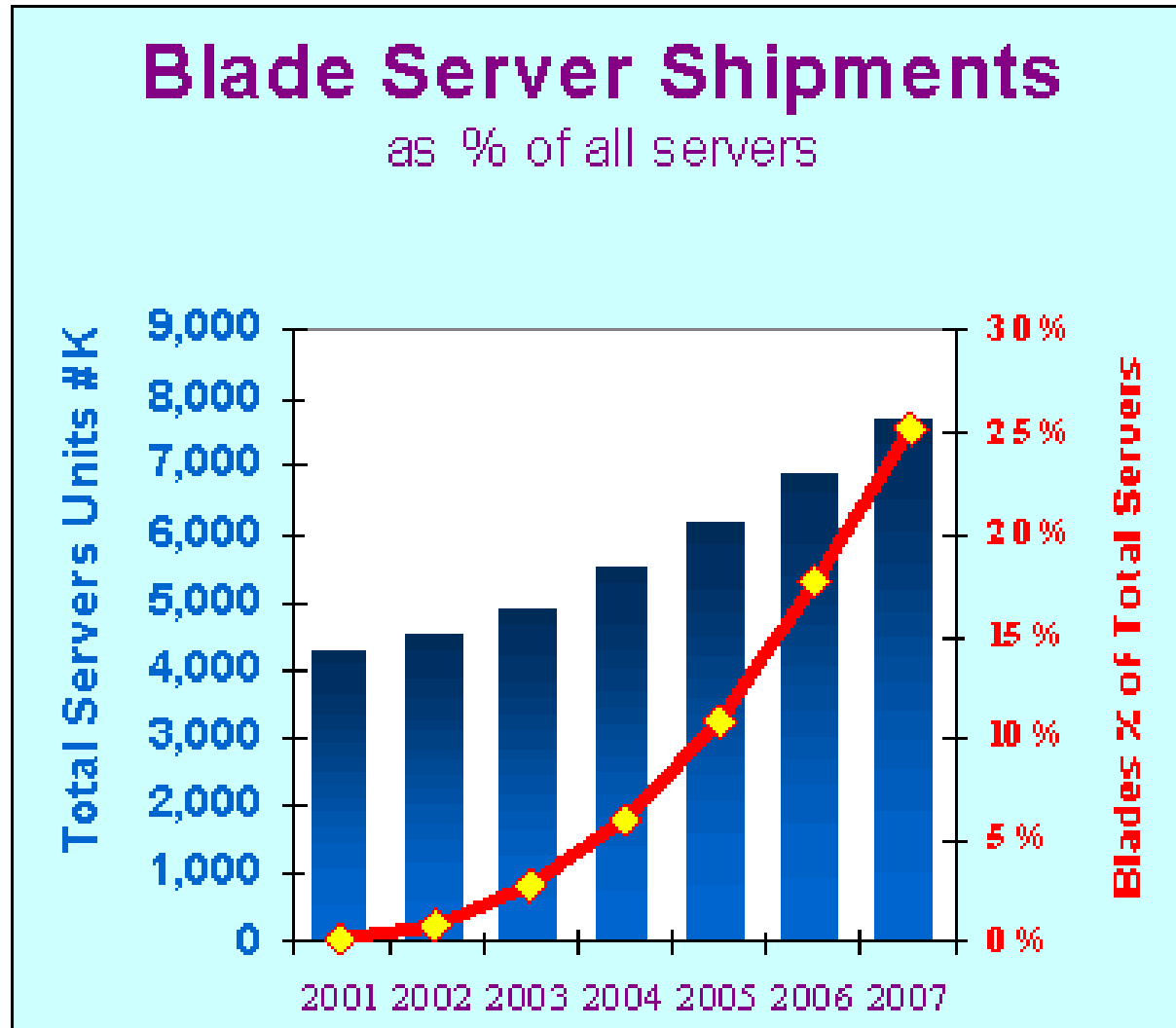
IP Infrastructure – End to End with HA & Security Products



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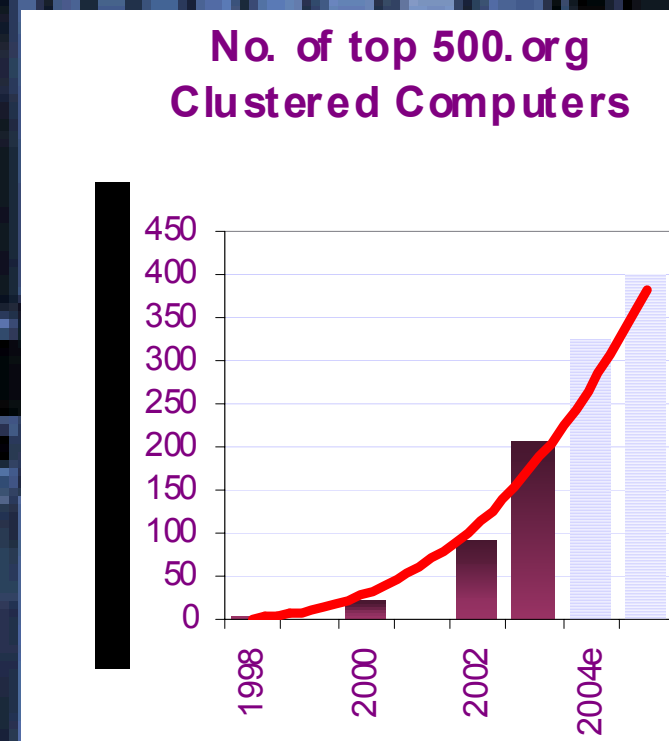
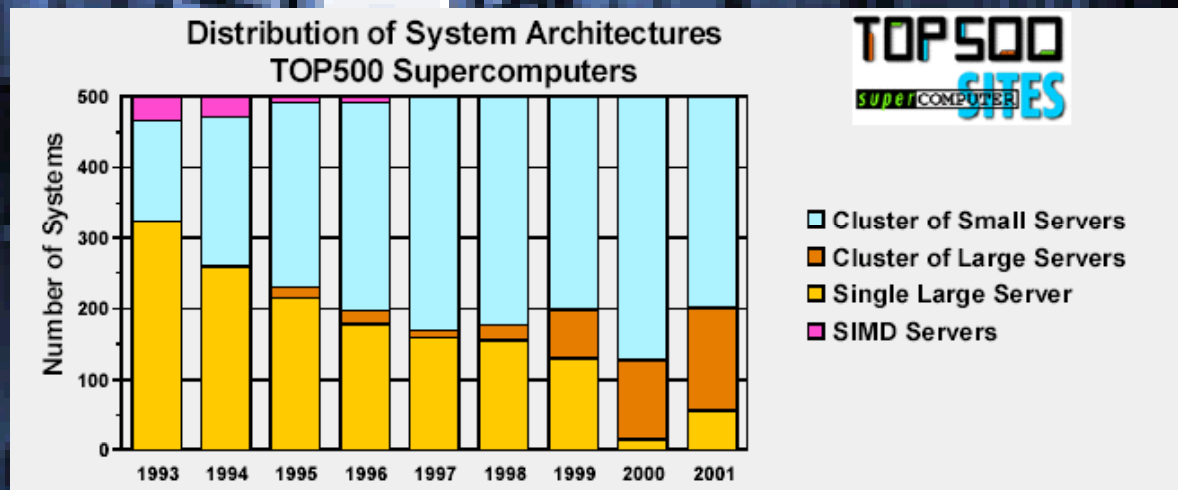


► *The fast growth in Blade Servers*



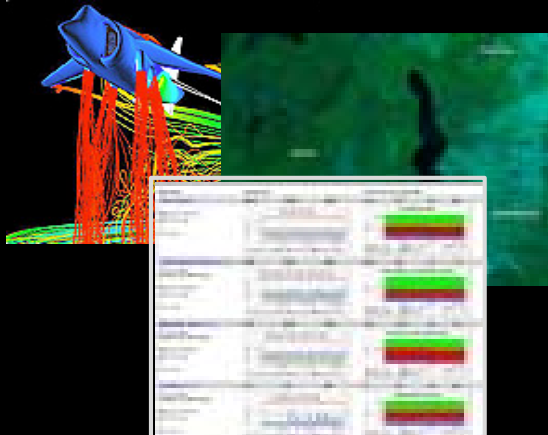
► The rise of HPC using ISS clusters

High Performance Computing



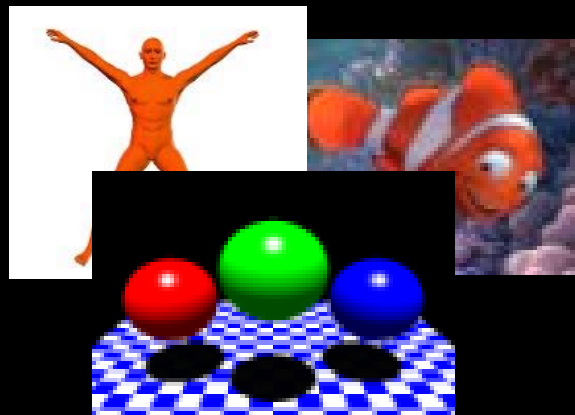
► HPC and Commercial Applications

High Performance Computing



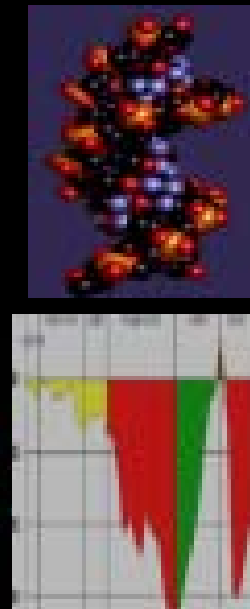
- 100+ Tera flops
- Through put = 100 GB/s

Commercial Visualization

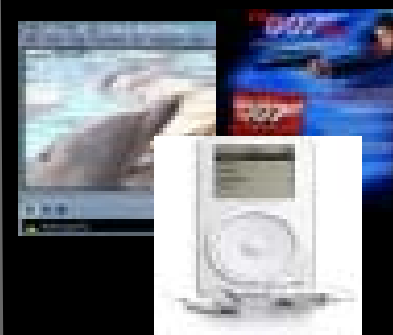


- Rendering & Post-Production
- Through put = 1.2 GB/s
texture & polygons

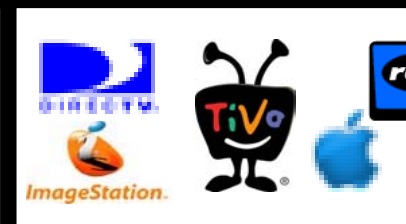
Bioinformatics WS\$ DSS



Audio/Video On Demand



- Data rate & capacity
- Through put : mark



Data: IMEX Research & Panasonic

First Approximation

- 7-8 million servers (IMEX)
- 25% are blades (IMEX)
- Blades represent \$7 billion (IDC)

Cluster Breakdown Estimate

- HPC cluster = \$3 billion (IDC)
- non-HPC cluster approx. \$4 billion (IDC)

Connectivity Estimate

- Connectivity 25% of HPC cluster (LNXI)
- Connectivity 10% of non-HPC cluster
(Wildwood)
- Connectivity total \$1.15 billion

Summary

- There is a large potential market
- There are economic benefits to be gained
- A Study Group would refine the detail