

# **Global Hyper-Converged Infrastructure Market By Component (Software and Hardware) By Organization Size (Large Enterprises and Small & Medium Enterprises) By Application (Data Center Consolidation, Virtual Desktop Infrastructure (VDI), Backup/Recovery/Disaster Recovery, Remote Office Branch Office (ROBO), Virtualizing Critical Applications and Others) By End User (BFSI, Telecom & IT, Healthcare, Government, Education, Manufacturing and Others) By Region, Industry Analysis and Forecast, 2019 - 2025**

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## **Abstracts**

The Global Hyper-Converged Infrastructure Market size is expected to reach \$27 billion by 2025, rising at a market growth of 33.2% CAGR during the forecast period. Hyper-converged infrastructure assures simplified and flexible solutions compared to the legacy ones. The integration of storage systems, servers, and networking switches can be managed under a single system, throughout all instances of a hyper-converged infrastructure. The in-built management functionalities ensure convenience in usability, and software-defined storage has a great potential to yield better scalability and resource efficiency. Also, organizations can start at a smaller scale and expand their resources as and when required. HCI vendors promote potential cost savings in aspects like IT labor; data center power and space; and avoidance of licensed software including backup or disaster recovery tools.

Hyper-converged technology has gained momentum in the early stages of development

because of its ability to provide virtual desktops. With the ever-increasing digital data and diversified sources, companies are moving towards high-performance, alongside a linear scaling architecture that is the primary focus of hyper-converged infrastructure. As the hyper-converged architecture has grown from traditional server workloads such as web servers, regular software, research & development to mission critical workloads such as SAP, SQL, and Oracle, the industry has achieved high adoption rates that influence market growth positively.

The need for scalable infrastructure with increasing demand for architectures, which can manage heavy workloads, like business analytics and big data tools, are some of the key drivers in the growth of the global hyper-converged infrastructure market. Major business leaders push companies to embrace software-centric architecture that lets them incorporate, process, and store in a single suite. This encouraged leading virtualization providers to move towards hybrid cloud solutions to help their customers migrate transactional workloads to the public cloud and execute heavy workloads, typically mission-critical on-premise.

Based on Component, the market is segmented into Software and Hardware. Based on Organization Size, the market is segmented into Large Enterprises and Small & Medium Enterprises. Based on Application, the market is segmented into Data Center Consolidation, Virtual Desktop Infrastructure (VDI), Backup/Recovery/Disaster Recovery, Remote Office Branch Office (ROBO), Virtualizing Critical Applications and Others. Based on End User, the market is segmented into BFSI, Telecom & IT, Healthcare, Government, Education, Manufacturing and Others. Based on Regions, the market is segmented into North America, Europe, Asia Pacific, and Latin America, Middle East & Africa.

The major strategies followed by the market participants are Partnerships. Based on the Analysis presented in the Cardinal matrix, IBM Corporation, Cisco Systems, Inc., Huawei Technologies Co., Ltd., and Microsoft Corporation are some of the forerunners in the Hyper-Converged Infrastructure Market. Companies such as Hewlett Packard Enterprise Company, Fujitsu Limited, and Dell Technologies, Inc., Nutanix, Inc., NetApp, Inc., NEC Corporation, and Hitachi, Ltd. are some of the key innovators in Hyper-Converged Infrastructure Market. The market research report covers the analysis of key stake holders of the market. Key companies profiled in the report include Cisco Systems, Inc., Fujitsu Limited, Dell Technologies, Inc. (VMware, Inc.), Microsoft Corporation, Hewlett Packard Enterprise Company, Huawei Technologies Co., Ltd. (Huawei Investment & Holding Co., Ltd.), NEC Corporation, IBM Corporation, NetApp, Inc., Hitachi, Ltd. (Hitachi Vantara), and Nutanix, Inc.

## Recent strategies deployed in Hyper-Converged Infrastructure Market

### Partnerships, Collaborations, and Agreements:

Feb-2020: NEC came into partnership with Mavenir, a cloud-native software company. The companies would work on 5G Open vRAN and Local 5G business developments for catering the Japanese enterprise market.

Feb-2020: Dell announced collaboration with BT, a multinational telecommunications company. Under the collaboration, the latter company integrates Dell EMC Virtual Edge Platform portfolio of on-premises systems to its Dynamic Network Services for providing more choices to its multinational customers and making network access faster and simple.

Jan-2020: Fujitsu extended its collaboration with Microsoft for adopting Hybrid IT-ready infrastructure for digital transformation. The users of PRIMEFLEX for Microsoft Azure Stack HCI would have access to Azure Files shares through Azure File Sync.

Dec-2019: HPE came into partnership with Nutanix, a cloud computing company. The partnership was aimed at bringing the hybrid cloud-as-a-Service solution to the market. This partnership enabled the latter company's channel partners to sell HPE-based appliances combined with Nutanix's Enterprise Cloud software directly.

Oct-2019: NetApp teamed up with Schneider Electric, a leader in the digital transformation of automation and energy management. The collaboration was focused on providing the pre-validated Optimized Edge for NetApp HCI solution, built on NetApp's hyper-converged infrastructure (HCI) platform and designed for enterprise, remote/branch offices, and small- to medium-sized business (SMB) spaces.

Oct-2019: Nutanix teamed up with ServiceNow, a cloud computing company. Under this collaboration, Nutanix's hyper-converged infrastructure (HCI) platform has been integrated with ServiceNow's IT Operations Management solution to automate critical private cloud workflows. Through this integration, the latter company's customers would have access to Nutanix-powered IT services and can get the direct notification of critical incidents related to Nutanix HCI in their private clouds.

Sep-2019: NEC partnered with Infovista, a leader in modern network performance. Under the partnership, NEC's software-defined network-based unified communications (UC-SDN) solution has been integrated with Infovista's Ipanema SD-WAN platform. The partnership was focused on SD-WAN for unified communications services.

Aug-2019: Fujitsu teamed up with Nutanix, a cloud computing company. In this collaboration, Fujitsu enabled the complete integration of mission-critical SAP HANA deployments on hyper-converged infrastructure (HCI) based on Nutanix Enterprise Cloud on PRIMERGY. This integration would further unlock simplified management,

increased scalability, and high performance throughout the hybrid and private clouds. Aug-2019: NetApp released a virtual desktop infrastructure (VDI) solution in partnership with VMware. This solution works with VMware Horizon and was designed to step up VMware workloads and make it easier to run applications from anywhere.

Jun-2019: IBM extended its partnership with Cisco Systems, a technology conglomerate. The partnership includes support for IBM Cloud Private, built on top of Kubernetes, on Cisco HyperFlex and HyperFlex Edge hyper-converged infrastructure (HCI) platforms.

Jun-2019: HPE made upgradation to its hybrid cloud portfolio. The upgradation includes more choices, enhanced automation, consistent experience, and workload-optimized solutions throughout clouds. These added new workload-optimized infrastructures through new partnerships with Equinix and Google Cloud.

May-2019: Nutanix announced collaboration with Intel, a technology company. This collaboration was focused on delivering a new hyper-converged infrastructure (HCI) solution based on 2nd Generation Intel Xeon Scalable processors and Intel Optane solid-state drives (SSDs). The solution would deliver an HCI building block suitable for multiple demanding workloads.

Apr-2019: NEC announced partnership with Scale Computing following which the latter company powered the hyper-converged infrastructure (HCI) solution for NEC.

Mar-2019: Huawei partnered with Nutanix, a cloud computing company. Under the partnership, both the companies aim at developing joint solutions for driving the hyper-converged infrastructure.

Feb-2019: Cisco signed partnership agreement with Nexenta, a leader in Open Source-driven Software-Defined Storage (OpenSDS). The partnership was focused towards delivering Nexenta's software-based enterprise file services to the Cisco HyperFlex solution.

#### Acquisition and Mergers:

Jul-2019: IBM acquired Red Hat, a multinational software company. Red Hat's portfolio includes five open source storage software products. The acquisition strengthened IBM's business in different ways.

Oct-2018: Hitachi Vantara, a subsidiary of Hitachi Ltd., acquired REAN Cloud LLC, a global cloud systems integrator. The acquisition provided expertise and critical capabilities in cloud migration and modernization to the company.

Jan-2018: Cisco took over Skyport Systems, a provider of hyper-converged infrastructure (HCI) with the added benefit of security. Skyport operates under Cisco Data Center and enabled the company in utilizing Skyport's seasoned software, intellectual property, and network expertise for accelerating the areas throughout

multiple Cisco portfolios.

#### Product Launches and Product Expansions:

Oct-2019: HPE made advancements to HPE SimpliVity, in its hyper-converged infrastructure (HCI) platform. The advancements include artificial intelligence for simplifying virtual machine management and free IT staff to focus on innovation.

Sep-2019: Microsoft introduced True Desktop VDI with Windows Virtual Desktop. It is a virtual desktop infrastructure (VDI) solution. This solution helps organizations in accessing applications remotely, which are running on top of Windows 7- or Windows 10-based client operating systems.

Aug-2019: Dell extended its VxRail solution by adding Kubernetes Support to it. The automated Kubernetes container service includes VMware's NXT security and networking framework along with "smart" life-cycle management.

Mar-2019: Microsoft unveiled Azure Stack HCI Solutions, a new implementation of its on-premises Azure product specifically for Hyper-Converged Infrastructure (HCI) hardware. It provides the companies a chance of migration to Azure environment within restraints of their enterprise than onto Microsoft's data centers.

Feb-2019: Huawei unveiled FusionStorage 8.0, the next-generation data center-level converged distributed storage solution. This solution uses the public cloud and mature enterprise-grade storage capabilities for helping customers in cloud migration challenges.

Nov-2018: Dell EMC updated its VxBlock, VxRail hyper-converged infrastructure. The enhancements were aimed at providing improved networking, management, and automation capabilities.

Oct-2018: Microsoft added CloudEndure Disaster Recovery (DR) solution to the Azure ecosystem. This is a software-as-a-service subscription in Azure. The solution provides a simple route for disaster recovery.

Oct-2018: Fujitsu released the ETERNUS DX8900 S4 storage solution. This solution delivers flash-optimized petabyte-scale storage to the data center. The solution also reduces complexity by eliminating the requirements for different storage tiers for different workloads and consolidates separate storage silos in a single system for assigning the soft migration to an all-flash data center.

#### Scope of the Study

#### Market Segmentation:

#### By Component

Software

Hardware

### By Organization Size

Large Enterprises

Small & Medium Enterprises

### By Application

Data Center Consolidation

Virtual Desktop Infrastructure (VDI)

Backup/Recovery/Disaster Recovery

Remote Office Branch Office (ROBO)

Virtualizing Critical Applications

Others

### By End User

BFSI

Telecom & IT

Healthcare

Government

Education

Manufacturing

Others

## By Geography

North America

US

Canada

Mexico

Rest of North America

Europe

Germany

UK

France

Russia

Spain

Italy

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Singapore

Malaysia

Rest of Asia Pacific

LAMEA

Brazil

Argentina

UAE

Saudi Arabia

South Africa

Nigeria

Rest of LAMEA

Companies Profiled

Cisco Systems, Inc.

Fujitsu Limited

Dell Technologies, Inc. (VMware, Inc.)

Microsoft Corporation

Hewlett Packard Enterprise Company



Huawei Technologies Co., Ltd. (Huawei Investment & Holding Co., Ltd.)

NEC Corporation

IBM Corporation

NetApp, Inc.

Hitachi, Ltd. (Hitachi Vantara)

Nutanix, Inc.

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