HPC Budget Allocation Map: Industry Averages

Description: The High Performance Computing user community was surveyed to complete the seventh Site Budget Allocation Map, a look at how HPC sites divide and spend their budgets. Users were surveyed 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 25 unique items included in the analysis.

This report provides the average budget distribution for the responding sites within each category and presents an entire view of HPC budget distribution and IT product spending (excluding facilities and staffing).

Highlights from this study include:

- Hardware represents the largest overall budget item, accounting for 45% of the total HPC budget in 2014. Servers, followed by storage, continue to lead spending within the hardware segment. When asked for future budget trends, hardware is the primary driving force behind budget change. About 50% of sites that provided qualitative input on budget trends reported a change in hardware spending as their reason. About two-thirds expect hardware spending to increase, and one-third expect a decrease.

- Staffing continues to be the second-largest overall expense, accounting for 22% of sites. Average spending on staffing has stabilized over the last three surveys, after a few years of declining share. System management and operations, followed by application programmers, and user support and services, are the top three categories within staffing and account for 71% of the staffing budget.

- Software as a share of the overall HPC budget accounts for 13% of that budget. System software and software tools represent the largest share of expenditures within software, accounting for a combined share of 47% of the HPC software budget.

- Cloud/Utility/Outsourcing computing is still a very small percentage of overall HPC expenditures, with about 3% share. We have seen fluctuations year-to-year in spending on cloud computing but no consistent or significant movement either upwards or downwards.

- Budgets are expected to increase by 1% or more for 59% of all respondents, and 43% expect budgets to increase by more than 5%. Commercial sites showed the most optimism with 78% expecting budgets to increase by at least 1% and 66% expecting budgets to increase by at least 5%. About 19% of academic sites are expecting a decline in their budgets, which is a higher percentage than either commercial or government sites.

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