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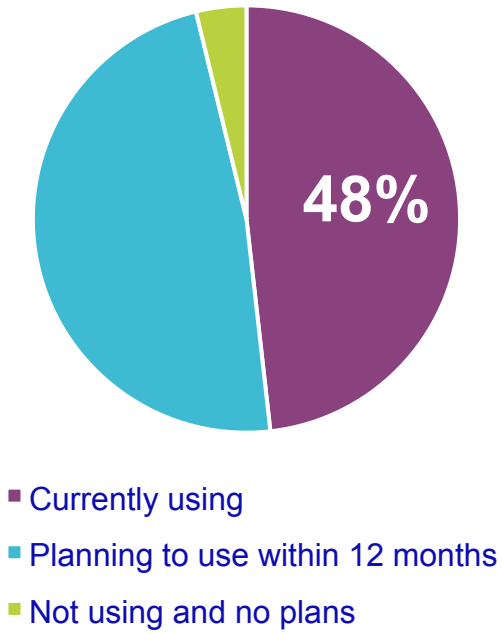
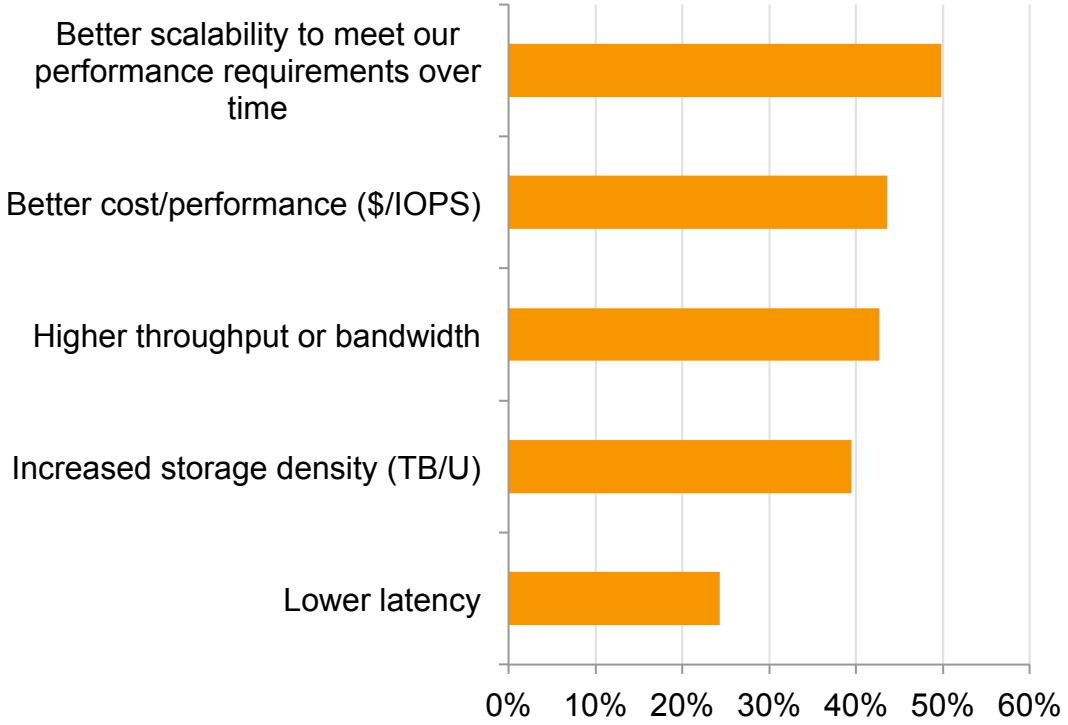
NVMe Adoption and Drivers

PCIe or NVMe Flash



Drivers to NVMe Adoption



N=804-Source: IDC, April, 2017

IDC's AFA Taxonomy

Primary flash arrays

- Structured, mission critical workloads
- Mixed workload consolidation (types 1-4)
- Dedicated application workloads
- Webscale workloads

Big data flash arrays

- Unstructured data workloads
- Flash throughput, bandwidth and density
- Support for high degrees of concurrency
- Scale-out architectures

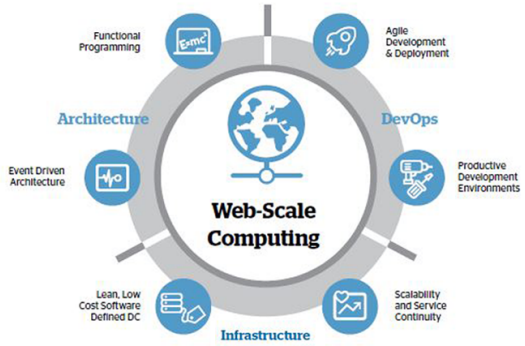
Rack scale flash arrays

- Structured/unstructured data workloads
- End-to-end NVMe based systems
- Built around webscale architectures+
- NVMf requires custom drivers

IDC ANALYZE THE FUTURE

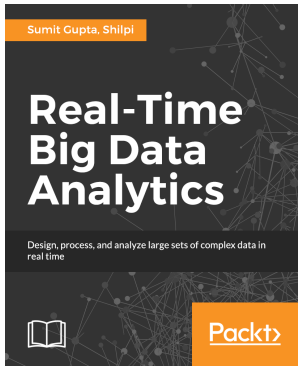
+ Now that EMC DSSD is gone

Building and Selling Rack Scale Flash Systems



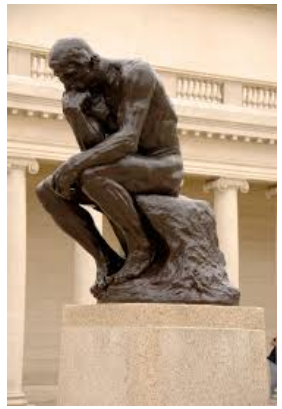
WEBSCALE

- SDS architectural model
- Will move increasingly towards commodity hardware
- Technology refresh model critical



WORKLOADS

- Key early workload targets include real-time big data/ analytics and high performance databases
- Offerings should support both structured and unstructured data sets



WISDOM

- "Build it and they will come" strategy will largely fail
- Match workload targets to evolving market need
- Enterprise capabilities strategy determined by workload evolution