

Labs' Take

Problem

Whether optimizing protein folding, studying population-level genomics, or training autonomous driving models; the need for high-speed computation is paramount.

Solution

Specialized, composable, and scalable computing hardware to solve complex problems intractable with general-purpose compute environments.

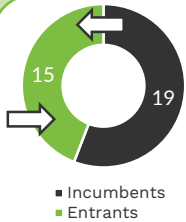
Result

- Can tackle more problem types
- Can solve complex problems faster
- Can increase capacity for experimentation

Findings

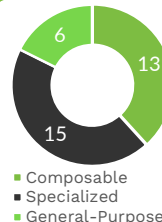
- Conventional compute still plays crucial role
- Specialized chips accelerate use cases
- Disaggregation and composability provide flexible reconfiguration and cost containment

The Trends



Incumbents still outnumber entrants; however new chip designs will fuel more entrants in the space. We will see consolidation as incumbents acquire entrants into their platforms.

Companies



While general-purpose compute solutions will continue to run the bulk of business applications, more specialized and composable platforms will proliferate for specialized use cases.

Approaches



Products in this space are being consumed by Early Adopter customers. Look for widespread adoption by progressive Early Majority companies (i.e., Crossing the Chasm) in the next 18-24 months.

Maturity



There has been moderate Venture Capital (VC) investment in this space over the past year. Increasing needs for unique computing solutions will likely lead to additional funding in 1-2 years.

Investment

The Players

Request a Review

Composable



Specialized



General-Purpose

