

## NEXT-GENERATION SUPERCOMPUTING IN EUROPE: A COMMUNITY IN ACTION ADVANCING HARDWARE, SOFTWARE, AND APPLICATION PERFORMANCE FOR THE EXASCALE ERA

What's next for Infrastructure? | ESA-NASA International Workshop on AI Foundation Model for EO | 5-7 May 2025 | ESA-ESRIN | Frascati, Italy

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### OBJECTIVE OF THIS TALK



Highlight today's supercomputing capabilities and applications and offer a view of emerging trends and challenges, while spotlighting select relevant achievements

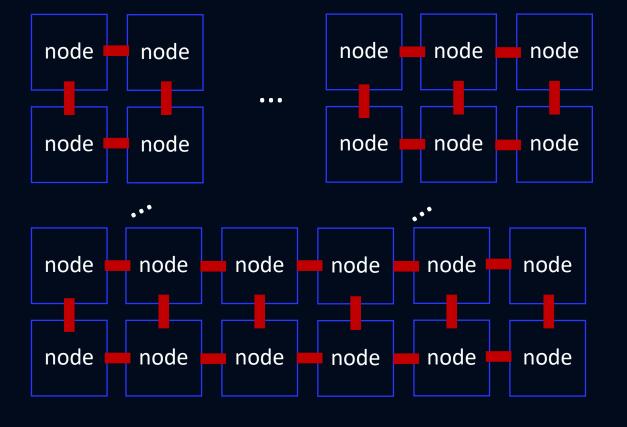
#### **OUTLINE**

- Background and Achievements
- **2** Evolution of Computing Technologies
- 3 Sustainability and Future Trends

### **BACKGROUND AND ACHIEVEMENTS**



#### HIGH-PERFORMANCE COMPUTING SYSTEMS

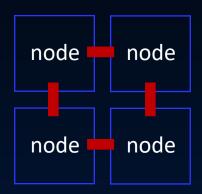


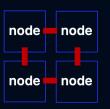
- High number of compute nodes
- Vast amounts of memory
- High-speed interconnects

**HPC** == tightly coupled parallel workloads



# WHAT IS INSIDE COMPUTE NODES?





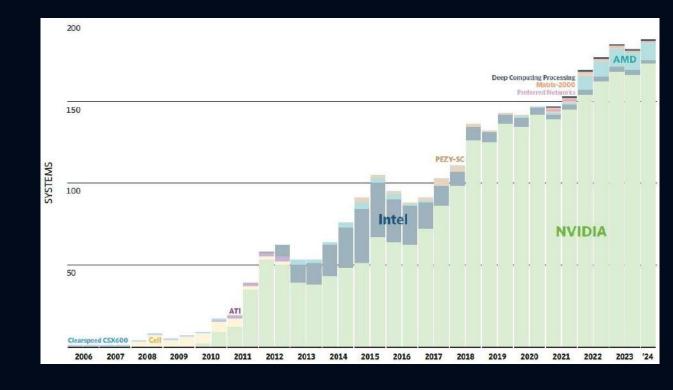
#### HPC SYSTEMS ARE ACCELERATED

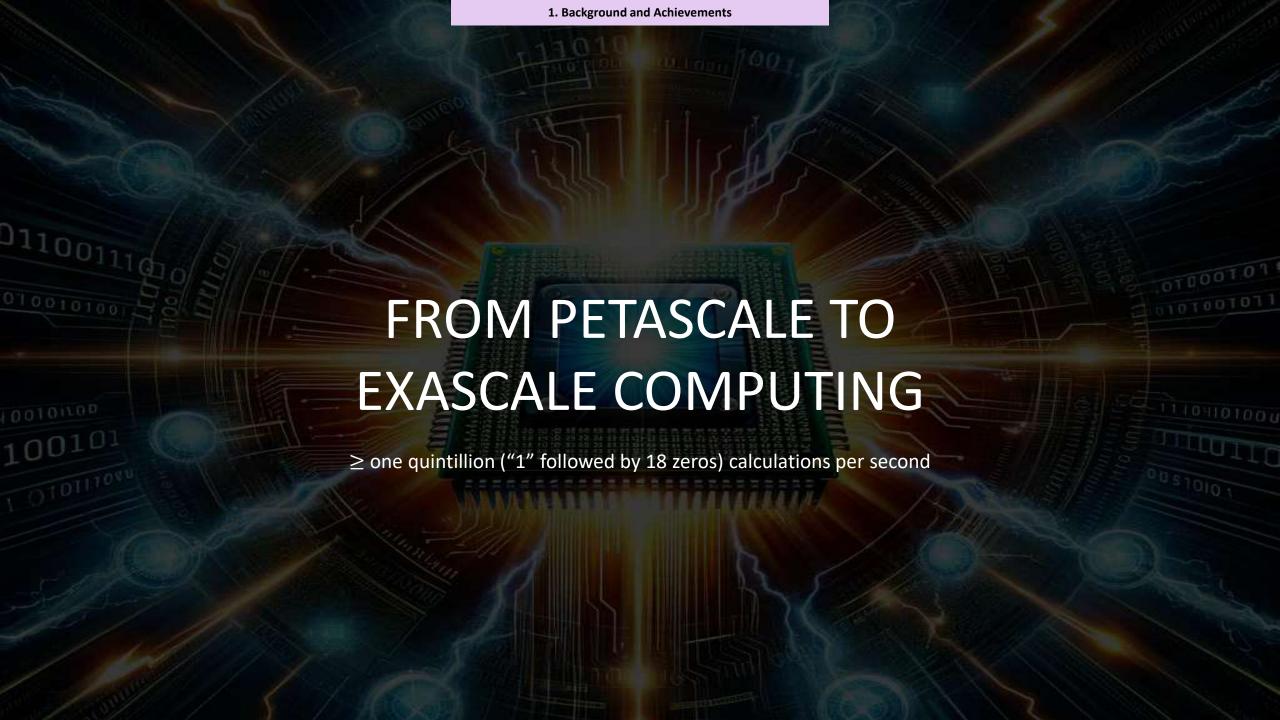
#### Last decade

- More and more GPUs installed in HPC machines
- More and more HPC machines with GPUs
- More and more GPUs in each system

#### Future

- GPUs selected as technology for enabling Exascale
- Even larger GPU machines with larger GPUs





## Frontier supercomputer debuts as world's fastest, breaking exascale barrier



May 30, 2022

# EXASCALE ERA (SINCE 2022)

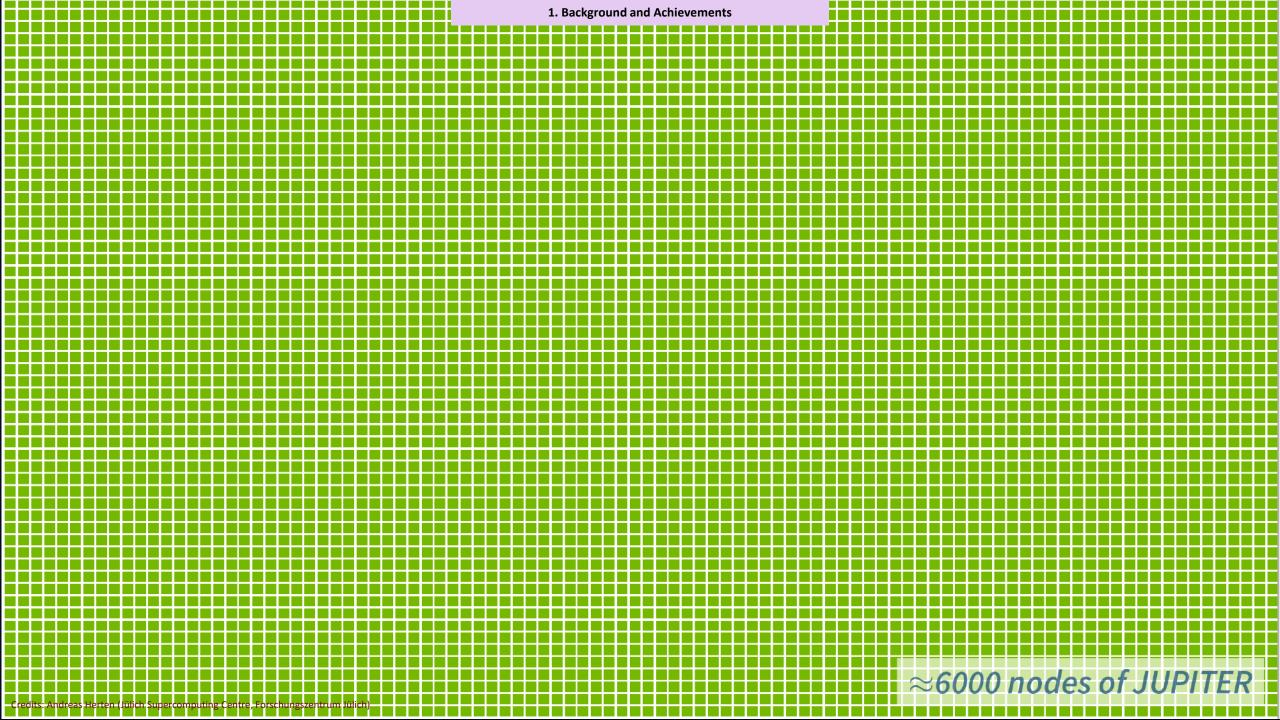
HPE/Cray/AMD EPYC/Radeon FRONTIER

#### JUPITER: FIRST EUROPEAN EXASCALE SYSTEM



JU Pioneer for Innovative and Transformative Exascale Research (JUPITER)

Performance of 1 million smartphones (a stack as tall as Mount Everest)



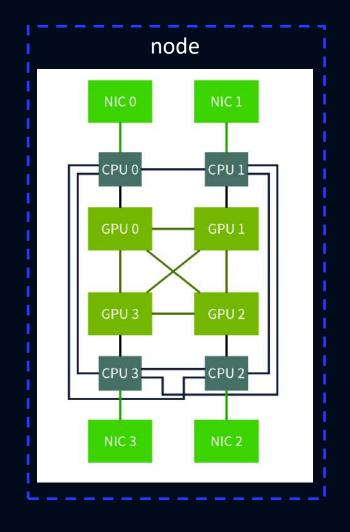
#### JUPITER BOOSTER

~6000 nodes, ~24 000 GPUs, 224 000 network devices

- GPU: 4 × NVIDIA H100 Grace-Hopper flavor 96 GB memory per GPU
- CPU:  $4 \times NVIDIA$  Grace,  $4 \times 72$  cores;  $4 \times 120$  GB LPDDR5X memory
- Network:  $4 \times NVIDIA$  Mellanox InfiniBand NDR200,  $4 \times 25$ GB/s































# ENGINE OF SCIENTIFIC PROGRESS. TACKLE PRESSING SOCIETAL PROBLEMS











**Physics** 

Chemistry

Medicine

Climate

Society

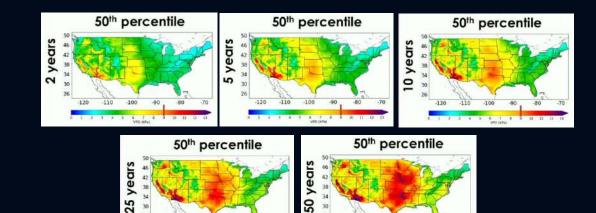
Used for data-intensive and computation-heavy scientific and engineering applications

#### IMPROVE PREDICTION OF FLASH DROUGHTS WITH HPC

- New method to predict flash droughts
  - Vapor Pressure Deficit (VPD): Threshold 9kPA
    - $\circ$  Humidity=10%, T = 46°C
- Predictions, drought days/year above threshold:
  - +10 days in California(CA) coastline
  - +30-40 days in NW and MW
  - +100 days in CA central valley

HPC usage: Intrepid, Mira (BG/Q), Theta (KNL)

- Estimated compute time: ~1M node-hours
- Used 10 years of simulation data from other facility work (from multiple climate models)





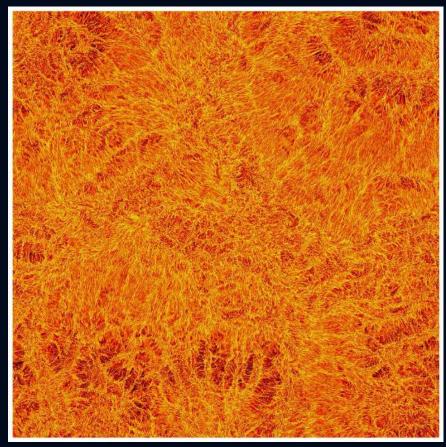






#### HOW TO ANALYSE EXTREME SCALE SIMULATIONS?

Example: in situ visualization to access more data



In Situ Workflow using ASCENT

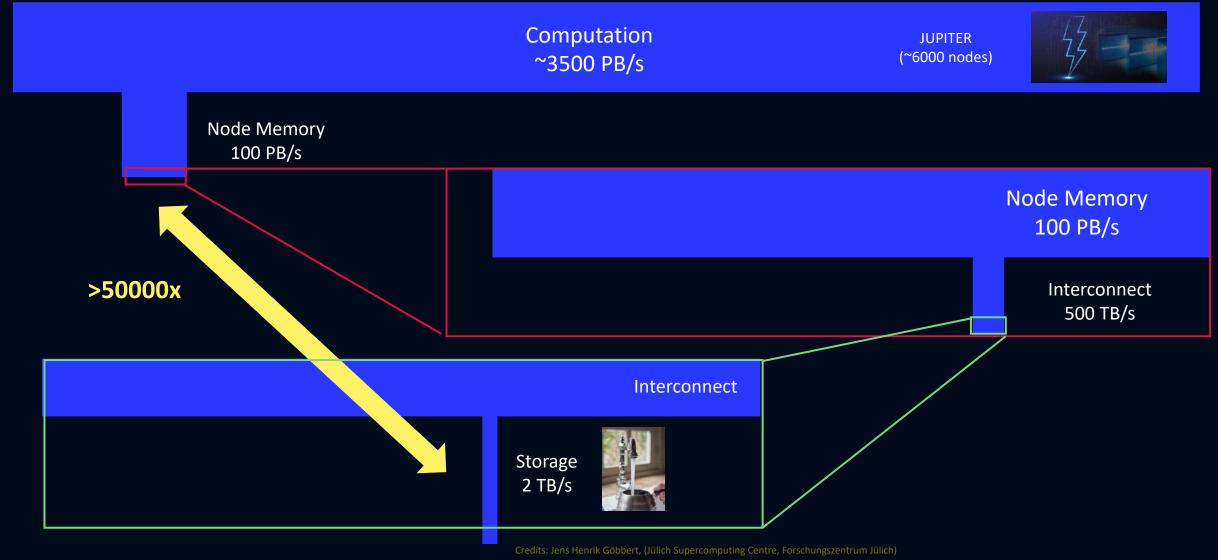
- Application: Thermal convection
  - For understanding complex phenomena in stellar and planetary interiors and atmospheres driven by several factors in combination
  - Researchers often study the idealized model of convection –
     Rayleigh–Bénard convection (RBC)
- Large HPC setup with 3360 GPUs:
  - $-46.7 \times 10^9$  unique points
  - Computed with nekRS 23.0



Convective mesoscale turbulence at very low Prandtl numbers

Ambrish Pandey, Dmitry Krasnoy, Katepalli R. Sreenivasan and Jörg Schumache

#### **HOW TO ACCESS MORE DATA?**





## HPC SPENDS WHATEVER IT TAKES TO ADDRESS THE CHALLENGES IN DISTRIBUTED COMPUTING

- 1. The network is reliable
- 2. Latency is low and fixed
- 3. Bandwidth is high and fixed
- 4. The network is secure

- 5. Topology doesn't change
- 6. There is one administrator
- 7. The network is homogeneous
- 8. Transport cost is negligible



**Eight\* fallacies of distributed computing** 



#### HPC POWER IN THE EU IS PUBLICLY ACCESSIBLE

Europe hosts 30% of the world's top ten supercomputers

- European network of cutting-edge supercomputers deployed by the
   European High-Performance Computing Joint Undertaking (EuroHPC JU)
  - EuroHPC was launched in 2018 and co-funded by the EU, Member States, and private actors.
- TOP500 (November 2024, global ranking)
  - LUMI (#8)
  - Leonardo (#9)
  - MareNostrum 5 ACC (#11)



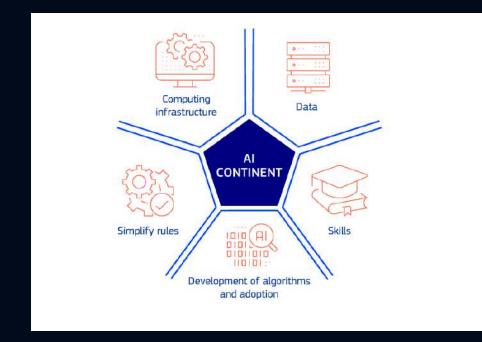
#### AI CONTINENT ACTION PLAN

#### 5 Pillars for Europe to become the Al Continent

- 1. Building a large-scale AI computing infrastructure
- 2. Increasing access to high-quality data
- 3. Promoting Al in strategic sectors
- 4. Strengthening Al skills and talents
- 5. Simplifying the implementation of the Al act

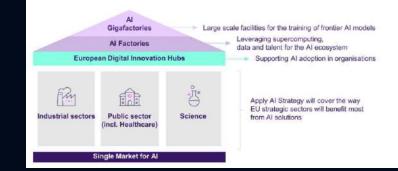
PRESS RELEASE | Feb 11, 2025 | Paris | 3 min read

EU launches InvestAl initiative to mobilise €200 billion of investment in artificial intelligence\*



#### AI CONTINENT ACTION PLAN

Area: Computing infrastructure



#### **AI Factories**

- Objective: train and finetune Al models
- Budget: €10 billion from 2021 to 2027
- At least 13 operational Al factories by 2026

#### Al Gigafactories

- Objective: train and develop complex AI models
- 4x more powerful than Al Factories
- €20 billion mobilised by InvestA!
- Deploy up to 5 Gigafactories

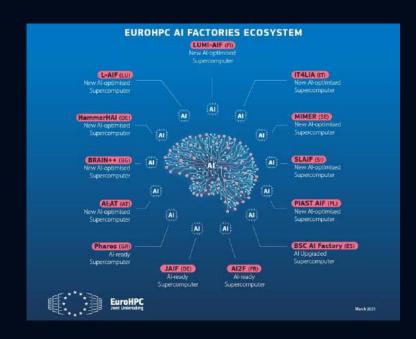
## Cloud and Al development Act

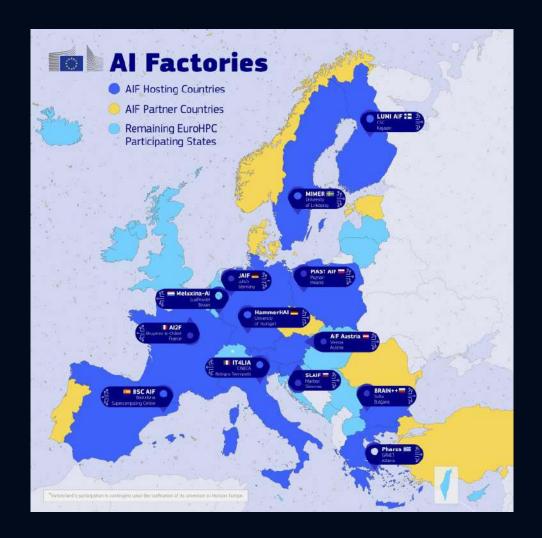
- Objective: boost research in highly sustainable infrastructure
- Encourage investments
- Triple the EU's data centre capacity in the next 5-7 years

#### **EUROHPC AI FACTORIES**

#### To triple the current EuroHPC AI computing capacity

- Facilitate access to Al provided by HPC facilities
- Dynamic ecosystems that foster innovation, collaboration, and development in the field of AI
- Support startups, industry, and researchers to develop cutting-edge AI models and applications.





#### THE JUPITER AI FACTORY (JAIF)

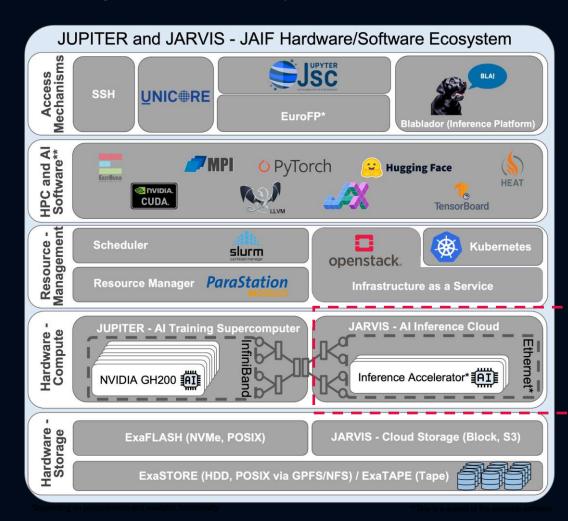
Modular JUPITER - Hybrid Training/Inference Al System







Contact: jaif@fz-juelich.de





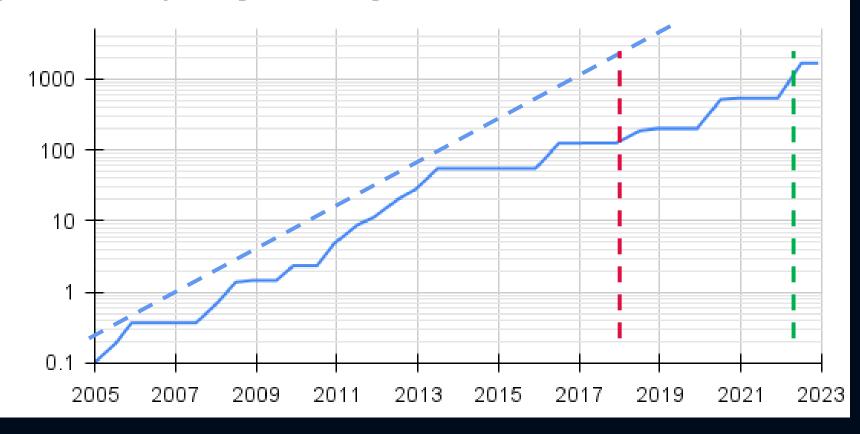
JUPITER inference system JARVIS (JUPITER Advanced Research Vehicle for Inference Services), a cloud-based AI inference platform

### **EVOLUTION OF COMPUTING TECHNOLOGIES**

#### **EXASCALE ERA**

Rpeak [PFLOP/s]

#### Top #1: HPL Rpeak [PFLOP/s]



- 1997: First 1 TFLOP/s computer: (Intel ASCI Read/9152)
- 2008: First 1 PFLOP/s computer: (Roadrunner)
- So.... First 1 EFLOP/s computer: 2018 !!
  - Well... not really
- It took 4 more years... **2022**



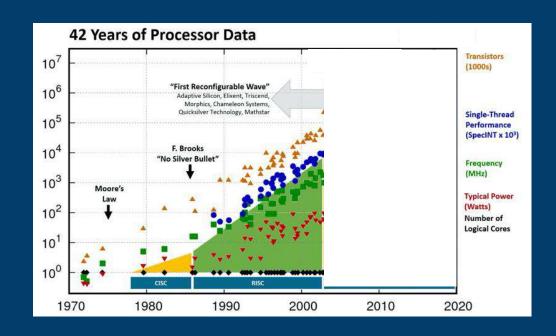
https://www.top500.or

HPE/Cray/AMD EPYC/Radeon FRONTIER

#### UNTIL ~2005, PERFORMANCE CAME FROM THE BOTTOM

#### Moore's Law

Drove the semiconductor industry to cram more and more transistors and logic into the same volume



#### **Semiconductor Technology**

#### SINCE ~2005 PERFORMANCE COMES FROM "THE TOP"

#### End of Dennard's Scaling

Limits in how much it is possible to shrink voltage and current without losing predictability



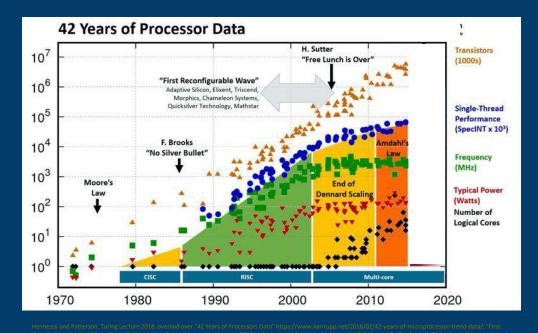
#### Multi-Core Era

Triggered by the Instruction Level Parallelism (ILP) wall



Challenges in terms of energy efficiency, thermal management and parallelizability

#### Better software technology and algorithms

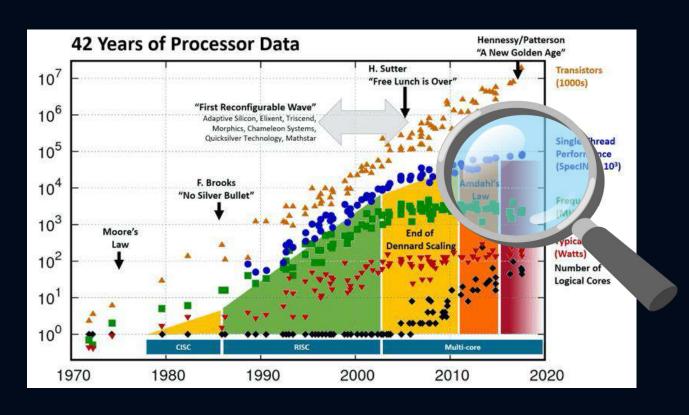


Still better HW architecture (HW architecture matters, but much less than software and algorithms)

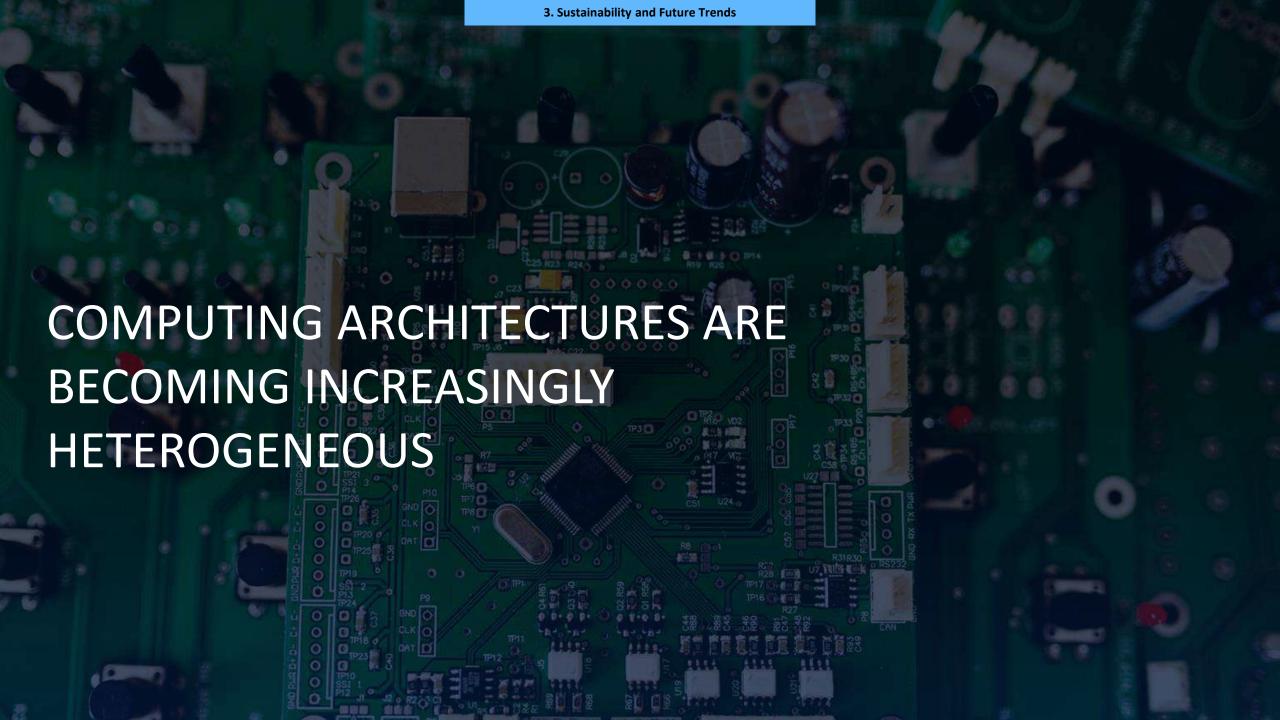
Semiconductor Technology



## WAVES OF EFFICIENCY WILL COME FROM A TIGHTER INTEGRATION OF TECHNOLOGIES FROM ALGORITHMS TO HOUSING INFRASTRUCTURE



- Stagnation of general-purpose computing
- Increase in domain-specific computing optimizations to counteract the end of Dennard scaling
- Objective: obtain the best performance-cost-energy tradeoffs for defined computing tasks



### HETEROGENEITY IN HPC





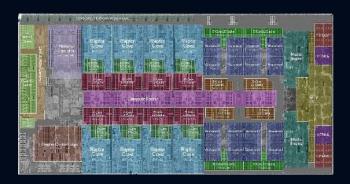




Intel Agilex FPGA

RISC-V

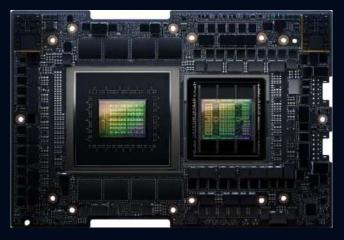
**ARM Cortex CPU** 



Intel Raptor Lake CPU Hybrid Architecture with 16 efficiency cores and 8 performance cores + integrated GPU



AMD EPYC with 192 Zen5 cores



**NVIDIA Grace Hopper** 

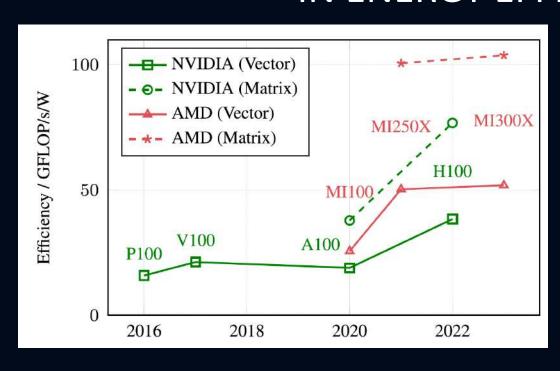
# COMMON PATTER EVOLUTION Specialist → Generalist → Specializing Generalist

- 1. Specialist technology working in limited conditions
- 2. Generalist technology leading to widespread adoption
- 3. Further specialization for various problem domains

Future systems will be increasingly heterogeneous, integrating GPUs, CPUs, FPGAs, and a wide range of domain-specific accelerators.

Specialized processors performing tasks suited to their architecture are more efficient than general-purpose ones

# SPECIALIZATION ENABLES INCREASES IN ENERGY EFFICIENCY



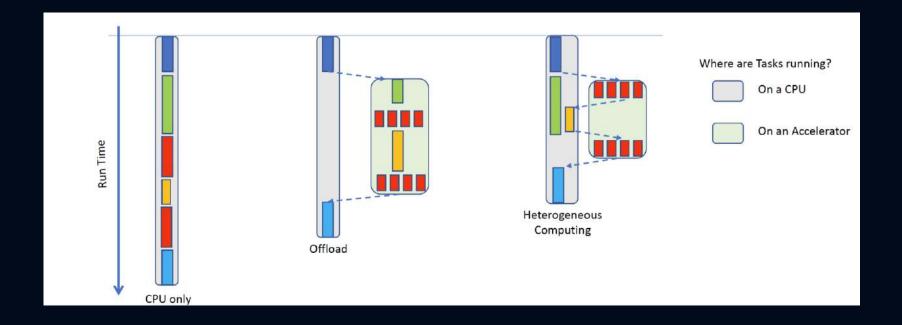
High-Performance Linpack (HPL) energy efficiency

(Matrix) → tensor cores for dedicated acceleration of matrix multiplication

- Efficiency plateau: Over last decade, raw GPU energy efficiency barely improved once basic data-parallelism was exploited
- Power of specialization: Adding tensor cores yields the largest jumps in FLOPS per watt (more than CPU or general-GPU tweaks)

# OFFLOAD VS. HETEROGENEOUS COMPUTING

- Offload: The CPU moves work to an accelerator and waits for the answer.
- Heterogeneous Computing: Run sub-problems in parallel on the hardware best suited to them.





GROWING HETETOGENEITY OF BOTH COMPUTE HARDWARE AND ENVIROMENTS

COMPUTE IS MUCH EASIER TO MOVE THAN DATA

### ORCHESTRATION OF NEW COMPLEX WORKFLOWS

With heterogenous computing and data processing environments

#### **Live Orchestration**



Currently in conflict with current resource management practices on supercomputers.

#### **Computing Continuum**

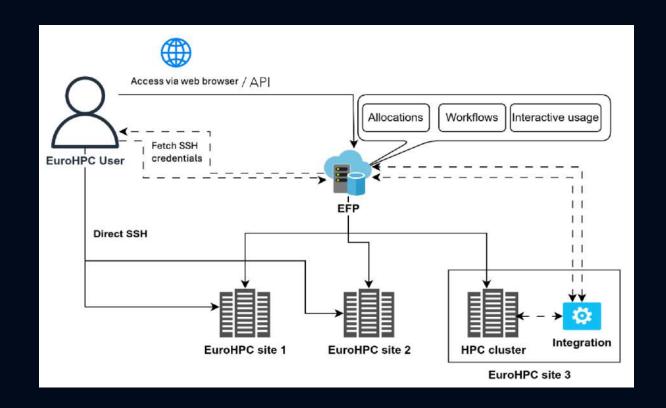
- HPC: one element in a continuum of computing, in charge of simulating very large tasks (e.g., digital twin of the Earth) but fed with data coming from the real world
- Many implications for HPC technologies:
  - e.g. computing loads with hard or soft real-time requirements for obtaining results or streaming processing "on the fly",
  - communication of data in and out with all the security related aspects,
  - authentication of the systems connected to the HPC engine, etc.

Computing and data processing environment where edge devices, heterogeneous nodes and both cloud and HPC resources are seamlessly integrated

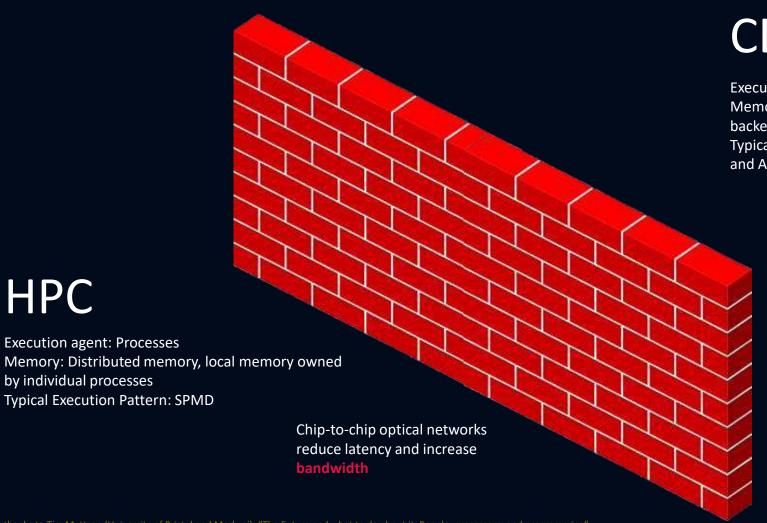
### **FEDERATION**

#### EuroHPC Federation Platform (EFP)

- Federated identity and Single-Sign-On (SSO)
- Resource allocation, management and monitoring across systems
- Direct access utilizing SSH certificates.
- Interactive web-based usage
- Federated software catalogue
- Advanced workflows and data transfer



# WILL LOW-LATENCY NETWORKS + OPTIMIZED SOFTWARE BRIDGE THE GAP?



# **CLOUD**

**Execution agent: Microservices** 

Memory: Distributed object store (in memory)

backed by a persistent storage system

Typical Execution Pattern: Event driven tasks, Faas,

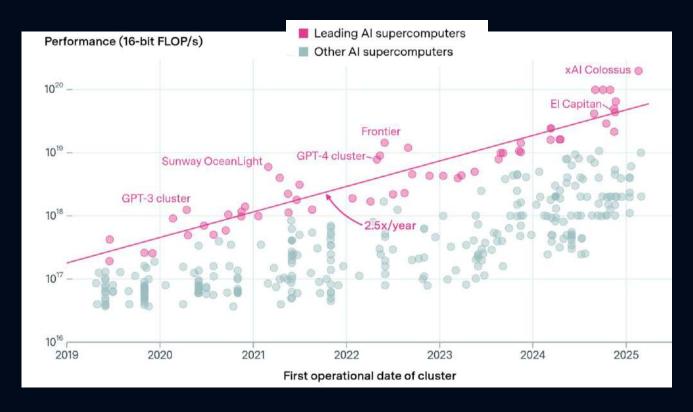
and Actors

Data Streaming Accelerators and IPUs reduce latency and jitter (faster, more predictable cloud performance for real-time and AI workloads)

**HPC** 

# TRENDS IN AI SUPERCOMPUTERS

# THE PERFORMANCE OF LEADING AI SUPERCOMPUTERS



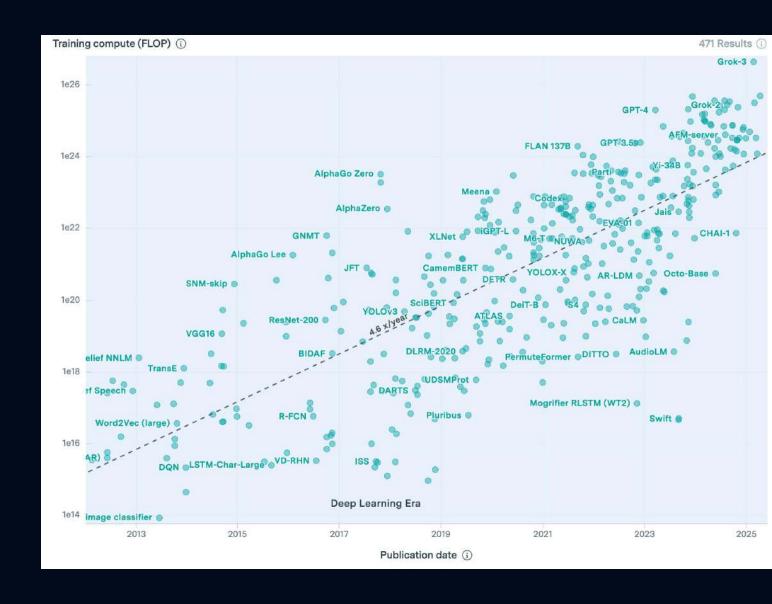
- Double in performance "every 9 months"
- Cost billions of dollars
- Require as much power as mid-sized cities
- Companies now own 80% of all Al supercomputers, while governments' share has declined.



## NOTABLE AI MODELS

#### Scaling "Spending" Law

- 2012: AlexNet
  - \$500 GPU x 2 = \$1K
  - 5 days of training
- 2022: GPT-4 (speculation)
  - \$8K GPU × 25,000 = \$200M
  - 90 days of training



# IN THE CURRENT SETUP ANY GROWTH BEYOND MOORE'S LAW IS ACHIEVED ONLY BY SPENDING MORE

Rising energy consumption

Year	OOMs	# of H100s- equivalent	Cost	Power	Power reference class
2022	~GPT-4 cluster	~10k	~\$500M	~10 MW	~10,000 average homes
~2024	+ı OOM	~100k	\$billions	~100MW	~100,000 homes
~2026	+2 OOMs	~ıM	\$10s of billions	~ı GW	The Hoover Dam, or a large nuclear reactor
~2028	+3 OOMs	~IOM	\$100s of billions	~10 GW	A small/medium US state
~2030	+4 OOMs	~100M	\$1T+	~IooGW	>20% of US electricity production

# REDUCE ENERGY CONSUMPTION AND CONSTRAINS

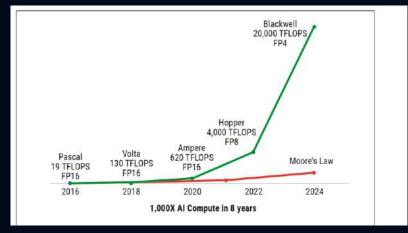
Justify use of energy and natural resources

#### **Decentralized training**



To overcome power constraints, companies may increasingly use decentralized training approaches, which would allow them to distribute a training run across AI supercomputers in several locations.

#### **Lower precision arithmetic**



Performance improvement of NVIDIA GPUs on Al workload

Twin advantages of higher floating point operation rates and reduced data movement and energy consumption

And many more solutions ...

N. C. Thompson, S. Spanuth, The decline of computers as a general-purpose technology: Why deep learning and the end of Moore's Law are fragmenting computing. SSRN 3287769 [Preprint]. 20 November 2019; doi: 10.2139/ssrn.3287769



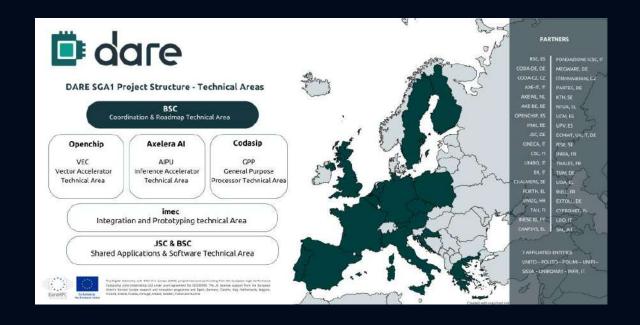
# TAIWAN SEMICONDUCTOR MANUFACTURING COMPANY (TSMC) FABRICATES MOST OF THE HIGH-END SEMICONDUCTORS ON WHICH THE WORLD DEPENDS.

- Today's computing innovation is increasingly driven by
  - the needs of large-scale cloud and AI providers,
  - balanced against the technical and financial challenges of a post-Moore's Law semiconductor era,
  - all unfolding within a shifting geopolitical landscape.
- Amazon, Apple, Google, Microsoft, Meta, and OpenAI are flying high
  - the Chinese DeepSeek AI shock showed there is no monopoly on AI innovation though.

# BUILDING A SELF-SUFFICIENT EUROPEAN CHIP MANUFACTURING AND PROCESSOR-DESIGN ECOSYSTEM

#### Plan for the upcoming years

- In 2018, the European Processor Initiative was launched with the aim of developing a designed-in-Europe Arm-based central processing unit (CPU) and RISC-V-based accelerators.
- DARE: major international follow-up project
  - Budget of EUR 240 million to develop a full HPC ecosystem based on open RISC-V processors (general purpose and accelerators, including Al-specific chips) and their integration into exascale and post-exascale European supercomputers
- Objective: strengthen the EU's strategic technological sovereignty, producing competitive HPC technology to power future European supercomputers



- Supercomputing is interdisciplinary (spanning several research domains)
  - System architectures, hardware components, system software & management, communication and network, programming environment, IO & storage, mathematics and algorithms, ecosystem technologies

- Dennard scaling has ended, and the returns from Moore's-Law transistor scaling are diminishing
  - Chip-level performance gains are slowing
  - Shrinking semiconductor feature sizes and increasing transistor complexity (planar → FinFET → GAA) are driving up the cost of leading-edge foundry construction

- To achieve higher performance, it is necessary to scale up the entire system
  - Major cloud providers are spending tens of billions of dollars annually on enormous data centers packed with AI accelerators that consume gigawatts of power,
  - Creating construction and operating costs that traditional HPC cannot match

- Main thematic trends in supercomputing
  - Federation, quantum+HPC, energy efficiency & sustainability, Al & foundational models

- Hardware complexity is growing: how do we increase performance?
  - Programs must expose greater parallelism and locality for the hardware to exploit
  - More co-design between users and HPC is needed: software engineers should collaborate with hardware architects so that new processors provide the abstractions required to use the hardware easily

- Continued algorithmic research in mixed- and low-precision arithmetic is essential
  - The gap between the sizes of the computational-science and AI markets is widening
  - Future hardware may prioritize lower precision (detriment of traditional modelling and simulation applications)

#### The line between HPC and AI is fading

 Al offers new opportunities in computational modelling via efficient, learned surrogate models, while HPC insights increasingly guide Al

#### Deeper overlaps between cloud and HPC are likely in the future

- Networking technology (optical interconnects and new topologies) is advancing rapidly
- With low latency, high bandwidth, and stable performance, cloud platforms can now support loosely synchronous and even synchronous applications
- HPC applications must evolve to handle reliability issues and network inhomogeneities



Cloud hyperscalers and the economics of generative AI are becoming dominant

DATE	LEADING AI SUPERCOMPUTER	PERFORMANCE (16-BIT FLOP/S)	H100-EQ $^{\dagger}$	NUMBER OF AI CHIPS	Power	HARDWARE COST (2025 USD)
MARCH 2025	xAI Colossus	$1.98 \times 10^{20}$	200к	200к	300MW	\$7B
JUNE 2026	Extrapolated	$5 \times 10^{20}$	500K	300K	600MW	\$14B
JUNE 2027	Extrapolated	$1 \times 10^{21}$	1M	500K	1GW	\$25B
JUNE 2028	Extrapolated	$3 \times 10^{21}$	3M	800K	2GW	\$50B
JUNE 2029	Extrapolated	$8 \times 10^{21}$	8M	1.3M	5GW	\$100B
JUNE 2030	Extrapolated	$2 \times 10^{22}$	20M	2M	9GW	\$200B

"...9 GW equals the output of nine nuclear reactors (a scale beyond any existing industrial facility)..."

K, F. Pilz, J. Sanders, R. Rahman, L. Heim, "Trends in Al Supercomputers", in arXiv:2504.16026, 2025, https://doi.org/10.48550/arXiv.2504.16026

- Quantum and biologically inspired computing (e.g., neuromorphic), along with semi-custom chiplet-based architectures, include new possibilities and may better match scientific and engineering workloads
  - At present, however, these technologies are immature and unlikely to rival today's silicon-based semiconductors in the near term
- Nature demonstrates that human-level intelligence need not consume megawatts; a few dozen watts suffices

# SOURCES AND AKNOWLEDGEMENT

#### Sources:

- European Technology Platform for High-Performance Computing (ETP4HPC), "Strategic Research Agenda 6", 2025, https://etp4hpc.eu/strategic-research-agenda/
- High Performance, Edge And Cloud computing (HiPEAC), "HiPEAC Vision 2025", https://vision.hipeac.net/
- All other references reported in the presentation

#### Acknowledgments:

- Colleagues at the Jülich Supercomputing Centre
- Insights drawn from previous presentations by Tim Mattson (University of Bristol / Merly.ai) and Daniel A. Reed (University of Utah)

#### Disclaimer:

- All data and materials have been selected, reworked, and personally interpreted by me.
- Any errors or omissions are my sole responsibility.

