

# Europe, Middle East and Africa Digital Infrastructure Strategies

Organizations are accelerating their shift to digital systems across all areas of their business, and IT is changing from an operations center to an innovation enabler. As this shift happens, new enterprise applications are largely being developed according to cloud-native principles, based on standardized platforms, runtimes, and integrated orchestration. However, infrastructure across Europe, the Middle East, and Africa (EMEA) is still being bought, built, and operated largely on client-server principles, with limited integration or automation, making adaptation to changing business needs long, complex, and costly. IDC's *Europe, Middle East and Africa Digital Infrastructure Strategies* research program highlights business and IT leadership perspectives on how changes in cloud, datacenter, network, edge, and AI/ML-powered infrastructure and operations are being used to enable and accelerate business agility, resilience, and innovation across core, edge, and cloud.

## MARKETS AND SUBJECTS ANALYZED

- The ongoing shift of private IT infrastructure to an as-a-service model and attitudes to consumption-based pricing
- The impact of self-driving/autonomous operations using AI/ML-powered observability and automation for cost, performance, and security optimization
- The impact of the dramatically increasing power consumption of performance-intensive computing needs on datacenter and infrastructure strategies
- Attitudes to datacenter exit and public cloud adoption
- The impact of GenAI on digital infrastructure budgets, deployments, and operations

## CORE RESEARCH

- The Role of Hybrid Cloud in Modern IT Infrastructure in EMEA
- Infrastructure Manufacturing Independence and Resilience in EMEA
- IDC Survey, 2025: Digital Infrastructure Evolution in EMEA
- Progress in Sustainable Datacenters and Infrastructure in EMEA

In addition to the insight provided in this service, IDC may conduct research on specific topics or emerging market segments via research offerings that require additional IDC funding and client investment. To learn more about the analysts and published research, please visit: [Europe, Middle East and Africa Digital Infrastructure Strategies](#).

## KEY QUESTIONS ANSWERED

1. What are the most important digital infrastructure technology trends impacting business success?
2. What cultural changes are needed to ensure success with deploying and managing digital infrastructure at scale?
3. How does the increasing maturity of AI-enabled analytics/operations across compute, data, and network infrastructure alter IT management and governance best practices?
4. How will end-to-end cloud stacks and hyperconverged infrastructure impact the evolution of private cloud?
5. How quickly and deeply will the impact of cloud-native applications and platforms be felt?
6. How should organizations approach deploying new power-intensive infrastructure and workloads with datacenters built to support traditional enterprise power density levels?

## COMPANIES ANALYZED

This service reviews the strategies, market positionings, and future directions of several providers in the digital infrastructure market, including:

AMD, Dell Technologies, HPE, NetApp, Cisco, IBM, Red Hat, Oracle, BMC, Broadcom, Intel, NVIDIA, Lenovo, Juniper Networks, Arista Networks, Fujitsu, Hitachi Vantara, AWS, Microsoft, Google Cloud