IDC Directions

Cloud platforms: The foundation for AI-driven innovation

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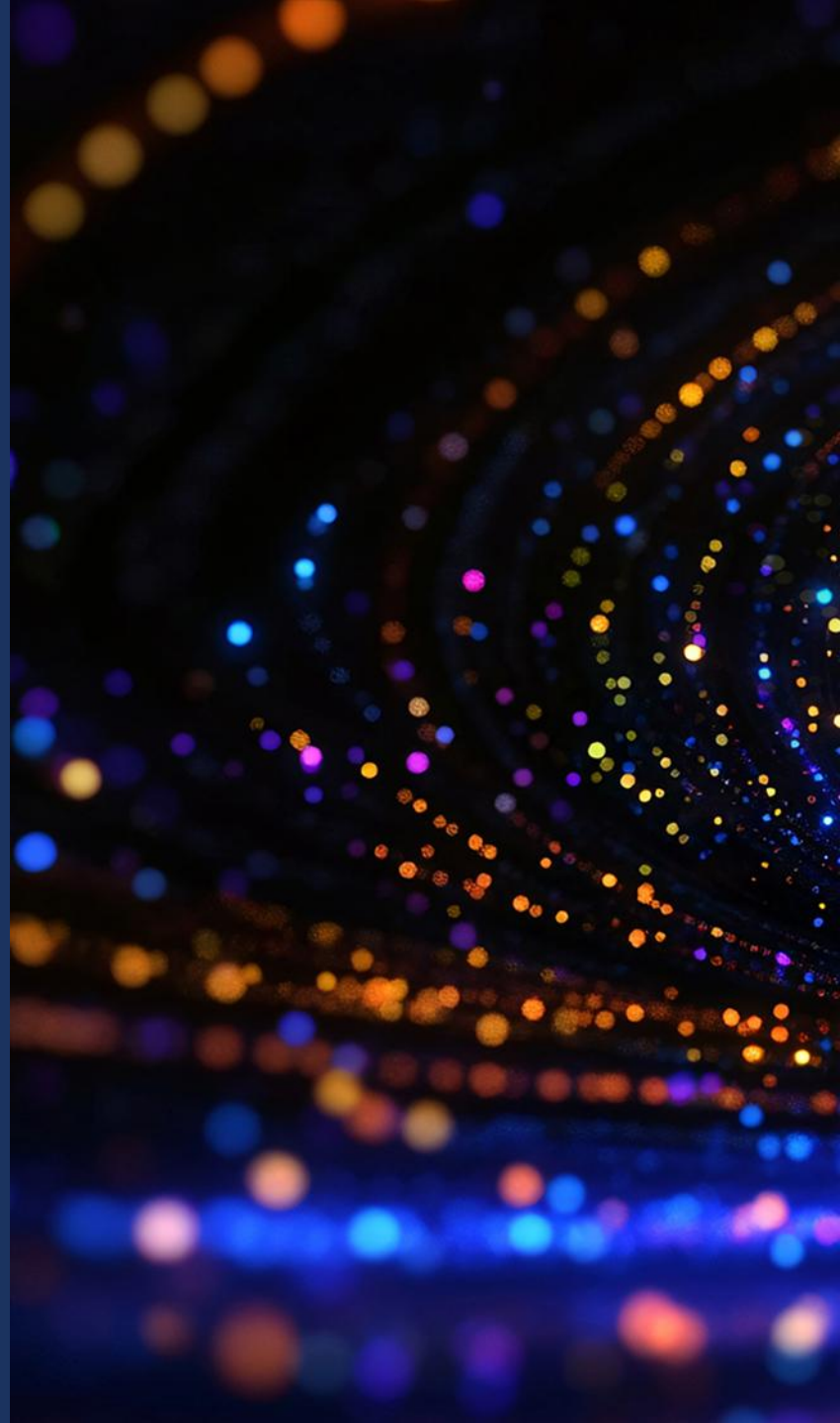
Agenda

- Enterprise priorities for 2025
- The strategic relevance of cloud platforms
- The impact of AI agents
- Cloud adoption trends
- What's next for cloud platforms?
- Essential guidance



Enterprise priorities driving tech spending increases

What are the top factors driving the significant increases in 2025 spending?

1

37%

Reducing IT operating costs

2

37%

Preparing for greater use of AI in the business

3

28%

New apps requiring more performance/ capacity

Source: Future Enterprise Resiliency & Spending Survey Wave 11, IDC, December 2024, Worldwide = 889

Strategic AI technology partners for 2025

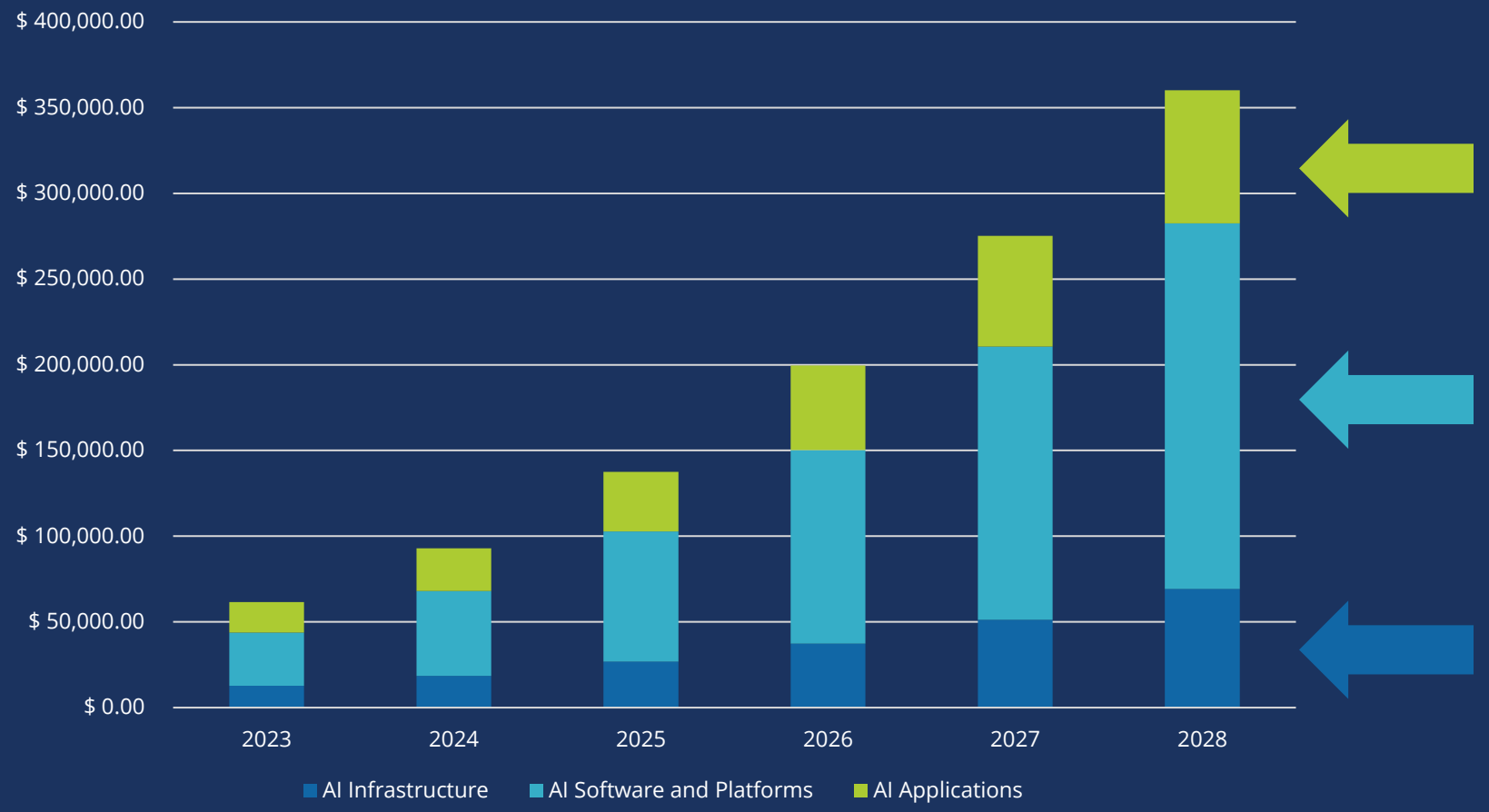
31% Cloud providers

30% Enterprise application providers

29% IT consulting providers

Source: Future Enterprise Resiliency & Spending Survey Wave 10, IDC, November 2024, N=888

AI cloud spending forecast (USD $M)



AI applications
$77.7 Billion, CAGR 34.2%

AI software and platforms
$213.3 Billion, CAGR 47.0%

AI infrastructure
$69.1 Billion, CAGR 40.5%

Source: Worldwide AI and Generative AI Spending Guide, IDC, February 2025

Advantages of cloud platforms for AI-driven innovation

Scalable compute resources

Cloud platforms allow you to dynamically scale GPU and TPU resources up or down based on training and inference needs, without large upfront hardware investments

Managed ML services

Major cloud providers offer services that simplify model deployment, versioning, monitoring, and updates. This reduces operational overhead and lets teams focus more on model development.

Cost efficiency

Pay-as-you-go pricing means you only pay for resources when actively using them, rather than maintaining expensive on-premises infrastructure that may sit idle.

Pre-built AI services

Cloud platforms provide APIs for common AI tasks like computer vision, NLP, and speech recognition, letting teams leverage existing models rather than building everything from scratch.

Integrated data services

Cloud platforms offer managed databases, data warehouses, and data lakes that integrate well with AI workflows, simplifying data pipeline development.

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AI platform choices center on protection of data, cost management, and compliance auditing

Which of these capabilities were most important in your evaluation of AI platforms?

1

42%

PII detection/ content moderation for training data

2

41.5%

Cost reporting

3

39.3%

Auditing for compliance

4

38.6%

Automation of data prep and training steps

Source: Future Enterprise Resiliency & Spending Survey Wave 10, IDC, November 2024, N=772

AI agents will enhance management of cloud platforms

Automated resource optimization

AI agents can monitor cloud usage in real-time, dynamically adjusting resources like compute power, storage, and bandwidth to match demand. This minimizes waste, reduces costs, and ensures peak performance.

Intelligent troubleshooting

With AI's ability to analyze logs and detect anomalies, agents can identify issues—like service outages or latency—before they escalate. They can auto-diagnose problems, suggest fixes, or even apply patches, reducing downtime.

Simplified deployment and configuration

AI agents can automate deployment pipelines, recommend optimal configurations, and even write infrastructure-as-code snippets.

Enhanced security and compliance

AI agents can continuously scan cloud environments for vulnerabilities, enforce security policies, and ensure compliance with regulations like GDPR or HIPAA. They might flag unusual access patterns, auto-encrypt sensitive data, or alert teams to misconfigurations.

Workload orchestration across clouds

As multi-cloud and hybrid setups grow, AI agents can intelligently distribute workloads across platforms based on cost, performance, or latency requirements.

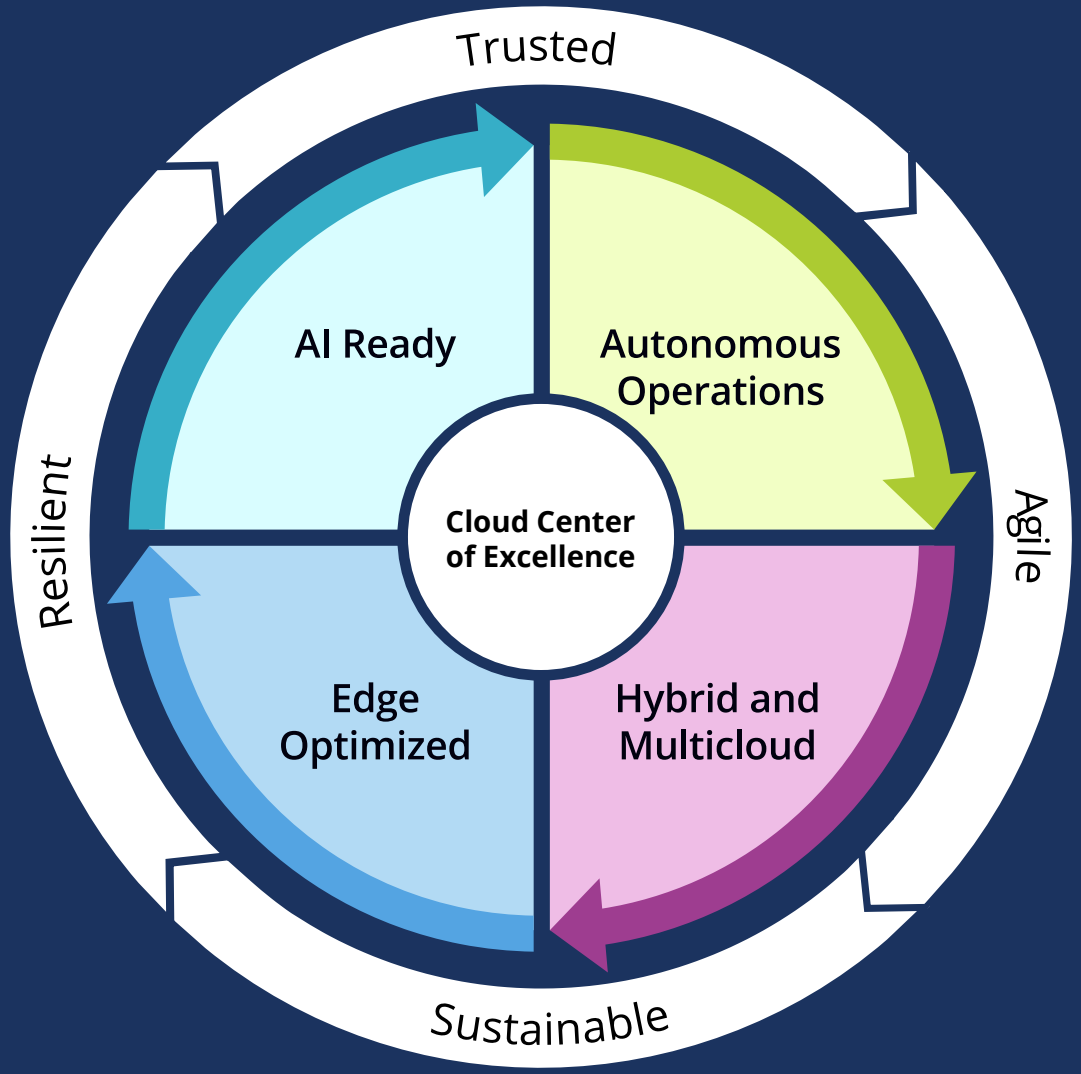
Design principles for cloud platforms

AI-ready infrastructure

Technologies optimized for the scale, performance, cost, sustainability and interoperability requirements of emerging AI workloads.

Edge optimized

Architectures that accommodate the increasingly distributed nature of enterprise computing and data management.



Autonomous operations

Observability, and automation to manage, scale and secure infrastructure consistently across data centers, co-location, cloud and edge locations.

Hybrid and multicloud interoperability

Applications and data deployed depending on the specific needs of the individual workloads enabling portability and modernization.

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Cloud estates are transforming to become more distributed

Cloud transformation

82%

of cloud buyers plan to modernize their cloud estate

Hybrid cloud

88%

are in the process of deploying or already operating a hybrid cloud

Multicloud

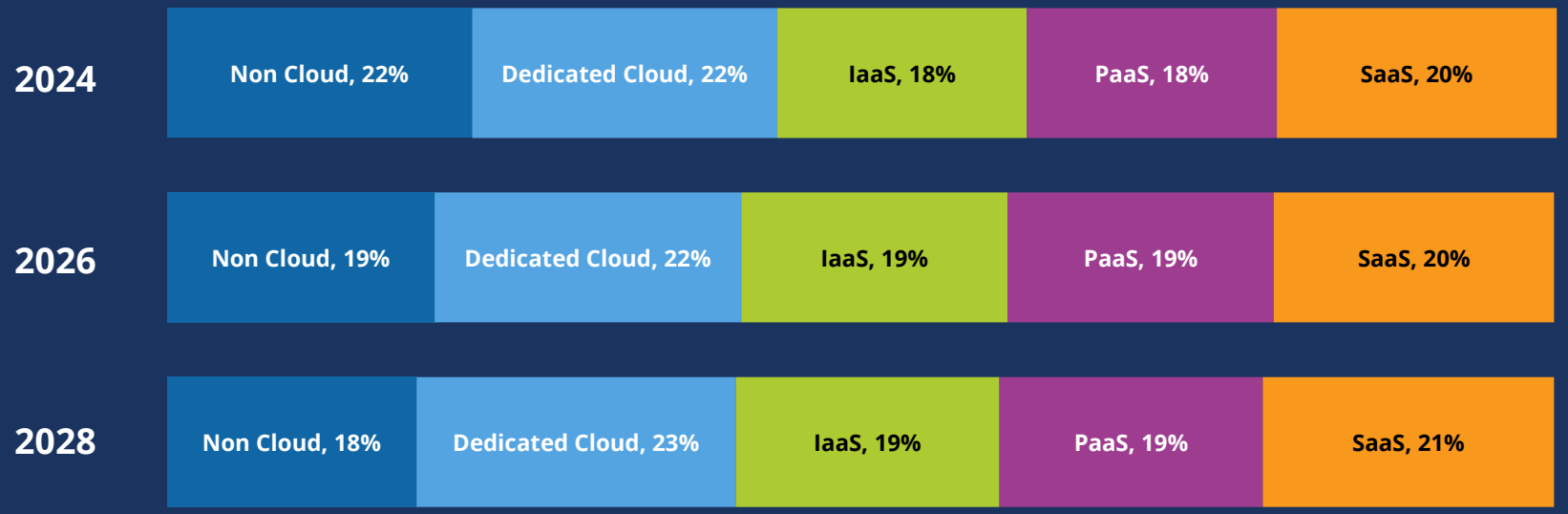
79%

are using multiple cloud providers (**90%** for those most familiar with cloud)

Source: Cloud Pulse, IDC, 2024

Applications will be split between public cloud, private cloud, and traditional IT infrastructure

Where are all your organizations applications deployed?

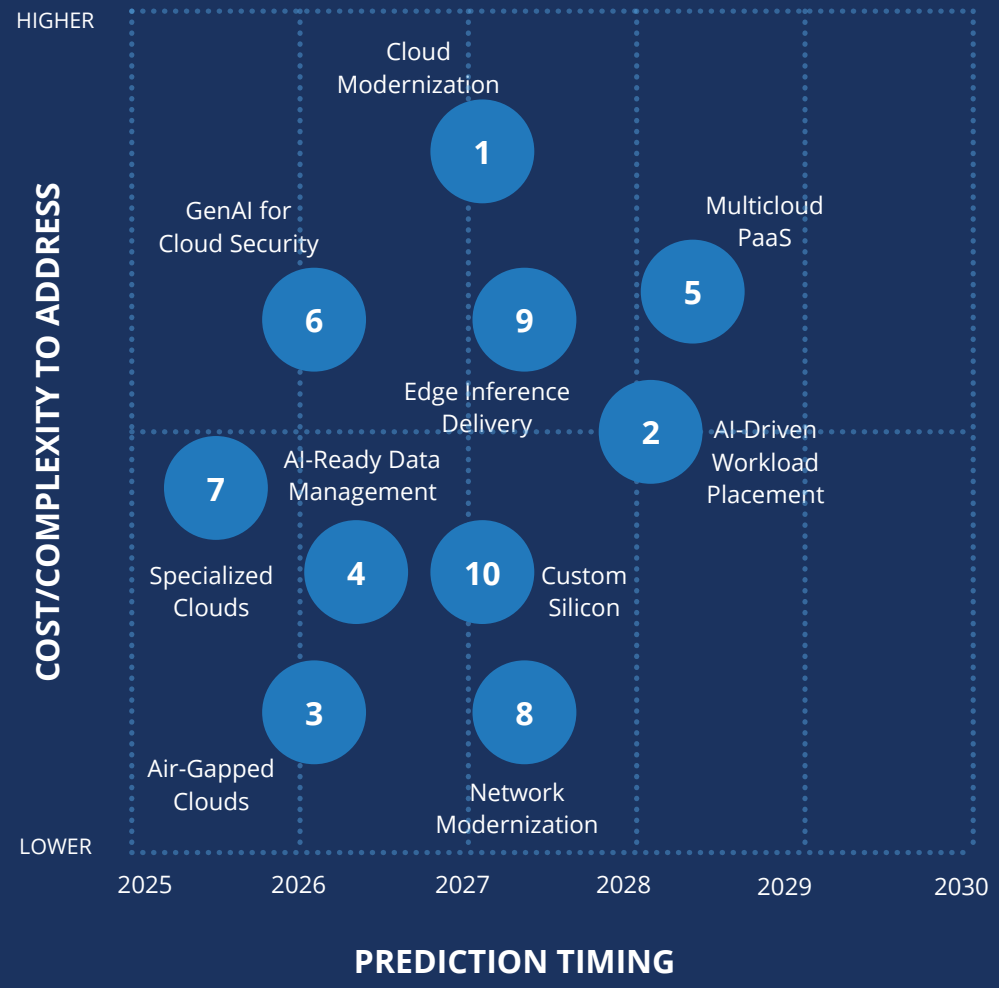


49%

of public cloud applications include an edge component

Source: Cloud Pulse, IDC, October 2024

What's next for cloud platforms?



By 2026, 75% of organizations **will leverage specialized accelerated cloud computing services** to maximize the speed of deployment and optimize the scaling of their AI and other accelerated applications.

By 2027, faced with the challenges of scaling GenAI inferencing, 80% of CIOs **will rely on edge services** from cloud providers to satisfy performance and data compliance requirements.

By 2028, more than 90% of newly developed applications **will be multicloud enabled**, having been architected to leverage platform-delivered capabilities and deliver more innovative solutions.

Source: IDC FutureScape: Worldwide Cloud 2025 Predictions, October 2024

Essential guidance

There is more to AI than just GenAI.

While it is important to ensure product roadmaps and marketing campaigns address customers' GenAI needs, there is also a significant amount of activity in other AI disciplines.

Cloud platforms are becoming more distributed.

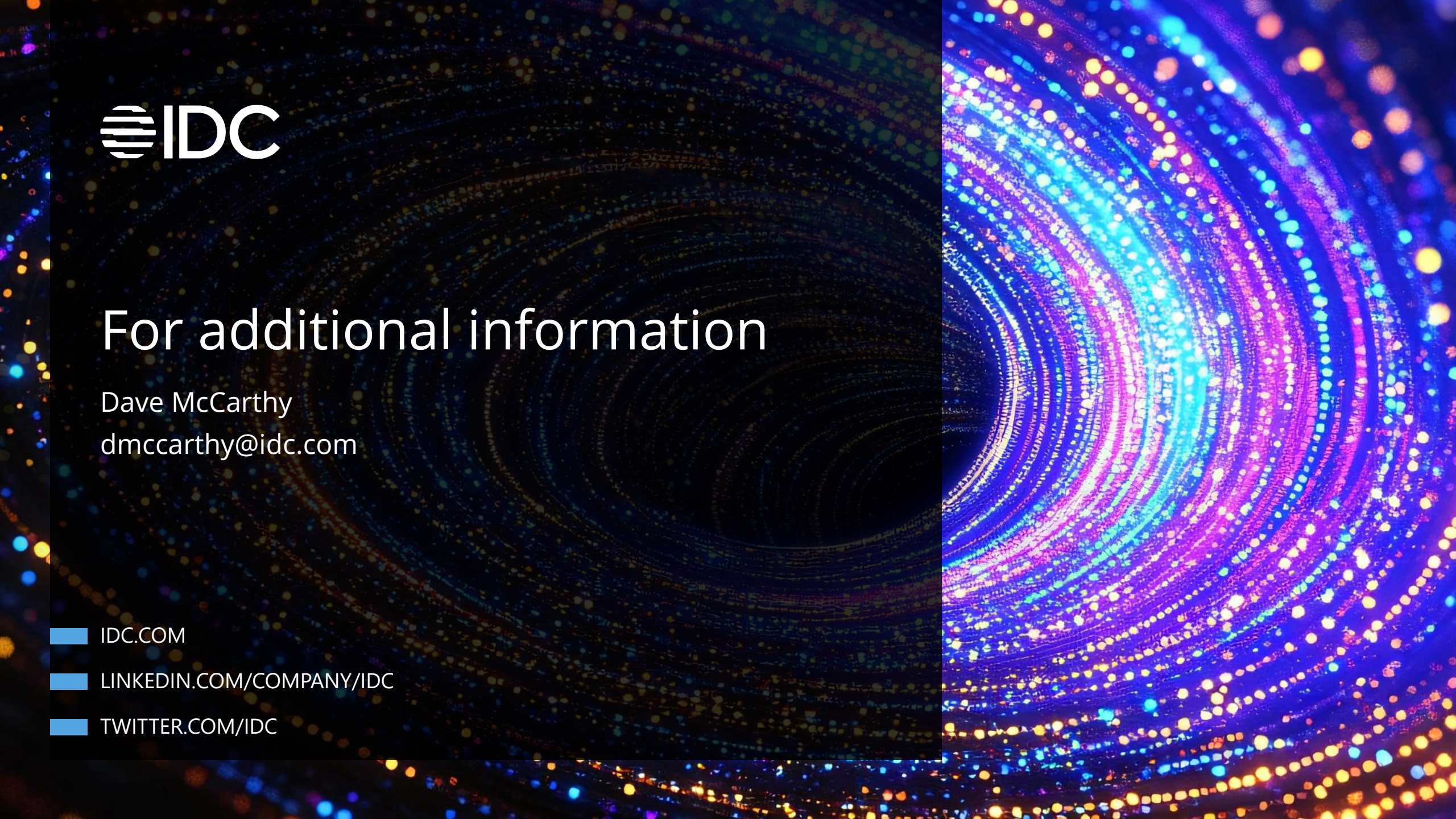
Private clouds and edge environments are becoming essential for maximizing the performance, cost, and security of AI applications and data.

Customers are rethinking their cloud strategies.

The maturity of cloud platforms and the demand for new AI capabilities is motivating many organizations to reevaluate technology choices and providers.

Create strategic importance.

Organizations increasingly look to cloud for AI-driven business innovation. Moving from a supplier relationship to a strategic one is essential for long-term customer success.



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