TRACK SESSION:
Transforming technology for an AI world

Rebuilding the tech stack

Agenda: Transforming **technology** for an AI world

Intro: Rebuilding the tech stack
Matt Eastwood
SVP, Worldwide Research

Future-ready infrastructure: Accelerating AI with fit-for-purpose computing
Ashish Nadkarni
GVP & GM, Worldwide Infrastructure

Cloud platforms: The foundation for AI-driven innovation
Dave McCarthy
Research VP, Cloud & Edge Services, Worldwide Infrastructure Research

2:15 – 3:00pm: Break & IDC Solution Showcase

Modern data management: Building the foundation for responsible AI
Stewart Bond
VP, Data Intelligence & Integration Software

AI security: Protecting the new frontier
Frank Dickson
Group Vice President, Security & Trust

■IDC

IDC Solution Showcase

Technology Solutions

⭐ AI-driven Operations, Observability & FinOps

• AI-driven Sourcing with IDC TechMatch

⭐ AI-ready Infrastructure

⭐ AI Trends & Research

⭐ Data-driven Business Strategy

⭐ Data Security & Compliance

• Deal Reviews & Pricing Benchmarks

• Leadership & Development

⭐ Research & Advisory for Technology Acquisition

• Understanding Buyer Sentiment

Custom Solutions

• Building & Repositioning Brands

• Impactful, Adaptable Strategy Development

Executive Strategies

• CMO and C-Suite Strategies

Data & Analytics

• Company Data

• Market Data

• IDC Velocity for Sales

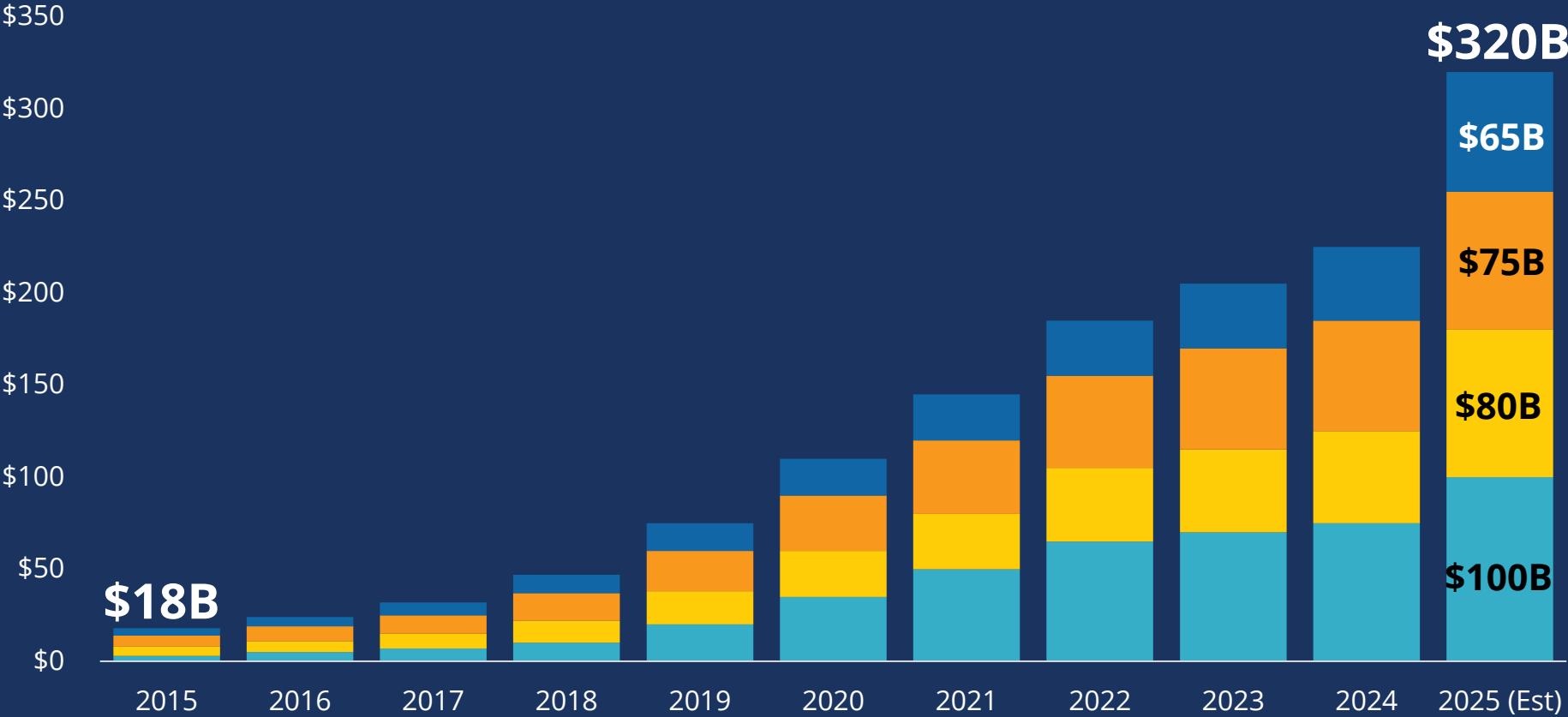# The Trillion-dollar question: 2015-2025 hyperscaler capex growth

18x GROWTH

$1.4 Trillion

Capital investments

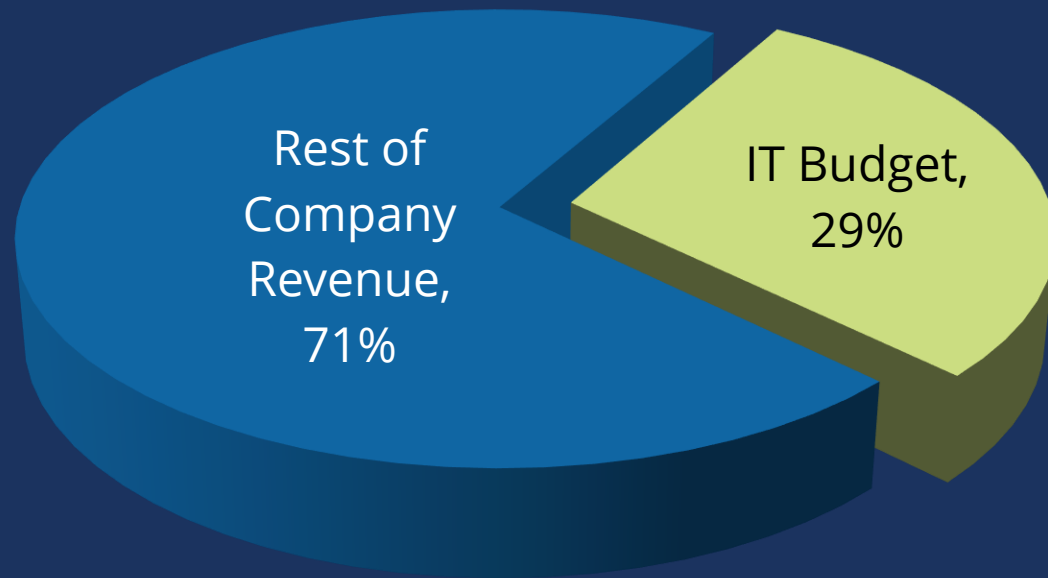**$1.4 Trillion (2015-2025)**

Billions ($)

Enterprise opportunities in AI

What percent of your organization's total revenue is spent on your IT budget, then what percent of this IT budget is for used to support new projects and innovation, and what percent of this is then for AI and GenAI?

Rest of Company Revenue, 71%

IT Budget, 29%

Enterprise innovation budget:

- **45%** of cloud buyer's IT budget is used to support business innovation

- On average, **35%** of that innovation budget is for AI (including GenAI)

- Of that, around **35%** of the AI budget is for GenAI

- Over the next year, **65%** of cloud buyers expect to see a moderate to significant increase in their budget for GenAI

Changing control plane requirements

Do you currently use a **third-party cloud management control plane** for delivery and management of cloud services? If so, what are the main reasons for selecting the cloud management control plane you use?

2023: 45% use a cloud control plane

Reasons for choosing control plane

1. Multicloud capabilities
2. Compliance & network options

Most important tasks

1. Enhanced security features
2. Managing traditional and componetized apps
3. Automating workflows for network and cloud scalability

2024: 62% use a cloud control plane

Reasons for choosing control plane

1. AI observability & automation
2. Digital and data sovereignty

Most important tasks

1. Enhanced security features
2. Data control plane capabilities
3. Managing cloud networks at scale

Key tech stack predictions

Digital Infrastructure

By 2028, 75% of enterprise AI workloads will be deployed on hybrid fit-for-purpose infrastructure to turbocharge time to value while optimizing performance, cost, and compliance.

Cloud

By 2027, more than 60% of businesses will have modernized up to 50% of their cloud architecture to encourage infrastructure and cost efficiency and enable business and technical innovation.

Data Management

By 2026, the use of data-as-a-product architectures will significantly break down data silos in 50% of large enterprises.

Security

By 2025, the same evidentiary requirements that exist for current compliance audits will extend to 100% of AI products, requiring organizations to demonstrate LLM build and exclusion of sensitive data.

Introducing our presenters

Digital Infrastructure

Understand why a fit-for-purpose infrastructure strategy—leveraging distributed, heterogeneous, and accelerated architectures—is critical to optimizing AI performance, cost, and scalability.

Cloud

Explore how cloud platform providers are evolving their services, deployment models, and partner ecosystems to give businesses a competitive edge in AI adoption at scale.

Data Management

Discover how modern data management—spanning structured and unstructured platforms, open data formats, and intelligent data products—ensures AI is built on trust, governance, and real business value.

Security

Investigate how GenAI is redefining security risks and what leaders must do to protect third-party applications, first-party software, and internally developed AI models.

For additional information

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