Service Provider View

IDC's *Service Provider View* is a data-centric, annual survey tracking the IT infrastructure investment strategies of tier 1 and tier 2 cloud service providers worldwide. This service measures the changing business models, strategic priorities, macroeconomic and business challenges, buy-side adoption trends and strategies, the impacts on IT infrastructure investments, and partnering opportunities in the constantly evolving service provider ecosystem.

MARKETS AND SUBJECTS ANALYZED

- **Providers covered:** ISVs/application developers; SaaS, IaaS, PaaS, and managed service providers; hosting providers; systems integrators; VARs/distributors; cloud brokers; and colocation providers
- **Subjects analyzed:** Cloud service provider business models; growth strategies, including the use of generative artificial intelligence (GenAI); market drivers and inhibitors, including macroeconomic concerns; operational strategies; and development and investment strategies with a focus on next-generation computing platforms, scale-up and scale-out computing architectures, accelerated computing, form-factor trends, edge computing, converged and hyperconverged infrastructure, block storage, file storage, object storage, and scale-out storage systems for performance-intensive computing use cases such as high-performance computing, AI, and analytics. Other subjects analyzed include on-premises versus off-premises infrastructure deployments, including datacenter and cloud use; sustainability; and the adoption of datacenter technologies such as liquid cooling.

CORE RESEARCH

- Executive summary (annual)
- Digest of survey findings (annual)
- Banner book with worldwide and regional insights where available (annual)
- Readout/webinar (annual)
- Unlimited access to associated analysts for inquiries
- Ability to request non-vendor-related data for reprints (additional charges)
- Note: In addition to the aforementioned research available for the base price, subscribers will be able to access non-vendor-related data for reprints. Subscribers also gain the ability to provide input into future surveys. IDC will provide subscribers with the ability to gain country, company size, and other non-published insights via custom market intelligence (CMI) add-ons. Subscribers will also have the option to purchase customized content packages, additional readout sessions, and other bespoke data insights via CMI add-ons.

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: Service Provider View.

KEY QUESTIONS ANSWERED

1. How are cloud service providers' business models evolving and what are the expectations for growth?
2. To what extent are cloud service providers a bellwether for new and disruptive technology adoption?
3. Which technologies are seeing the greatest traction, and where are cloud service providers channeling their investments?
4. What kind of partnerships are service providers finding most successful and which aspects are most important?
5. How will service providers' investments in their own on-premises technology grow relative to using third-party platforms or reselling?
6. What are the drivers and inhibitors of the cloud market from the perspective of the service providers?

COMPANIES ANALYZED

This service reviews the buy-side adoption and investment strategies, market positioning, and future direction of service providers in the global service provider market, including:

Accenture PLC, Capgemini, CenturyLink, Cisco Systems Inc., Cognizant, Dell Technologies Inc., DXC Technology, Hewlett-Packard, Hitachi Ltd., IBM Corp., Infosys Ltd., Iron Mountain, Kyndryl, Lenovo, NTT Communications, Oracle Corp., Rackspace Inc., Salesforce Inc., SAP SE, Tech Mahindra, Unisys Corp., Verizon, VMware Inc., and Wipro Ltd.