CLOUD AND DIGITAL SERVICE PROVIDERS DRIVING THE SHIFT TO THE "AS/hyphen.caseSERVICE" MODEL IN CORE INFRASTRUCTURE TECHNOLOGY MARKETS

Service providers’ ICT spending on core infrastructure technologies by 2022

- **Central and Eastern Europe**
  - $16 billion CAGR 5%
- **Western Europe**
  - $65 billion CAGR 3%

**Where to get more information:**

- Stefano Perini
  - Senior Research Analyst, European Customer Insights & Analysis
- Petr Vojtisek
  - Research Analyst, European Customer Insights & Analysis

**Source:** IDC Worldwide Black Book Service Provider Edition

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WHAT ARE SERVICE PROVIDERS?

- Any business that generates some portion of its revenue from the delivery of a provisioned ICT-based resource via a pay-as-you-use, on-demand, or subscription model

**Companies offering communications services:**
- Transport of voice, internet access, television programs over telephone network, IP network, and satellite

**Companies offering colocation facilities and related datacenter management systems:**
- Taking over the 24 x 7 operations of an IT or business process environment

**Companies delivering compute/storage/network resources, or cloud software services, or digital resources including a “self-service” element**

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**SOFTWARE IS THE FASTEST-GROWING INVESTMENT AREA**

Service providers’ ICT spending by investment area by 2022

- **IT Service Providers:**
  - $9 billion CAGR 0%
  - $15 billion CAGR 7%
- **Telecoms Service Providers:**
  - $34 billion CAGR 4%
  - $16 billion CAGR 3%
  - $7 billion CAGR 5%

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**CLOUD AND DIGITAL SERVICE PROVIDERS DRIVING ICT SPENDING GROWTH**

Service providers’ ICT spending by segment by 2022

- **Cloud and Digital Services Providers**
  - $13 billion CAGR 3%
  - $13 billion CAGR 5%

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**GROWING INTEREST OF SERVICE PROVIDERS IN CORE INFRASTRUCTURE TECHNOLOGIES**

Core infrastructure technologies

- **Server and Storage Hardware**
- **Enterprise Network Equipment**
- **Storage/Network Equipment**

Service Providers

- Non-Service Providers

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