

Adapt or die: European businesses  
take control of IT transformation with  
new infrastructure solutions

## The Digital Enterprise

IDC White Paper sponsored by Interxion

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## IDC OPINION

Becoming a truly digital enterprise changes everything, from how an organization develops new products and services to how it interacts with customers, maybe even to how it sees its role in the world.

IT is at the heart of digital transformation; it is a pivotal component that organizations need to get right to succeed in their digital strategy. However, it cannot stay static. Being digital means changing the way that IT infrastructure is housed and managed, and IT professionals need to understand and prepare for these changes.

Carrier-neutral datacenter provider Interxion commissioned IDC to survey 752 European enterprises, to understand how the rise of digital, as well as public and hybrid cloud, is affecting IT infrastructure and networking. The findings included the following:

- Companies rank the flexibility and performance of their IT infrastructure as the top success factor in digital transformation. This is most true of companies in the survey identified as "digital leaders," reflecting their hands-on experience in implementing a digital strategy.
- Digital leaders are far ahead of other companies in their use of hybrid cloud: 77% of them use or plan to use hybrid cloud, whereas half of companies moving more slowly in their digital transformation have no hybrid cloud plans at all.
- Companies at all stages in their digital journey are steadily shifting IT from on-premise facilities into third-party datacenters and the cloud. Digital leaders are furthest ahead, and are now close to 50:50 on-premise versus external forms of IT hosting.

However, at the same time many companies have significant concerns about the reliability and performance of network access to their IT as it moves off-premise, to the extent that the Internet has become a limiting factor on organizations' ambitions. Cloud connect services offer a potential solution, and their evolution into general-purpose multicloud platforms addresses many of the limitations companies face today.

This IDC White Paper presents the results of Interxion and IDC's survey, and shows how and why European organizations are adapting their approach to IT infrastructure as they prepare for a digital future.





# DIGITAL IS FAST BECOMING CRITICAL, AND IT INFRASTRUCTURE IS CRITICAL TO ITS SUCCESS

## Digital enterprise

The rise of the digital enterprise is undeniable. Forward-looking companies such as BMW, Caterpillar, GE and Fedex, as well as a slew of startup digital disruptors are using emerging technologies to transform their businesses and their industries. We asked companies to tell us where they are on their digital journey, before delving into how their infrastructure is changing in response.

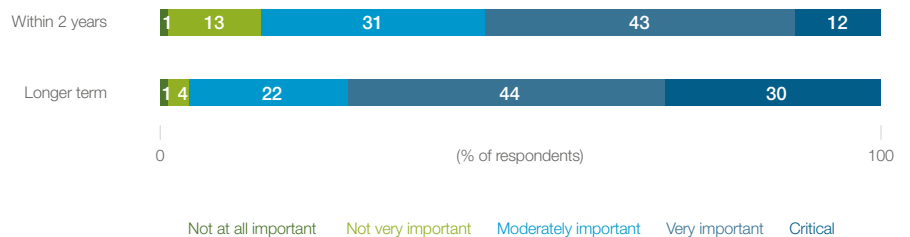
In the survey we defined digital transformation as the use of digital technologies such as cloud, social media, Big Data, mobile apps to fundamentally change an existing process, or to do something new that was previously unfeasible/impractical. And a digital enterprise was defined as an organisation that uses multiple digital technologies to transform part or all of its business.

On that basis, it is clear that companies appreciate how important digital is today and how much more so it will be in the future. Figure 1 shows that around half of companies believe it is very important or critical they can operate as a digital enterprise in the short term (within 2 years), growing to three quarters on a longer timescale, with essentially no companies considering digital irrelevant. The big change is in the number of organizations that understand digital will be not just important but critical to their business over the long term.



**Figure 1 – Over half of Enterprises will transform within two years**

Q. How important is it to your business that you become a digital enterprise?



Note: n = 752 (all companies). Source: IDC, 2017.

These organizations are found in all countries and industry sectors – finance organizations and larger companies for example – but they are particularly prevalent in Europe's biggest economies: the UK, France and, most of all, Germany where, stimulated by a national drive towards Industry 4.0, becoming digital long-term is critical for 50% of companies.

These are not just empty aspirations, they are backed by execution. Overall, 29% of companies rate the speed of progress in their digital strategy as "fast" (4 on a 1-5 scale), with a further 6% claiming to be progressing "extremely fast" (5 out of 5).

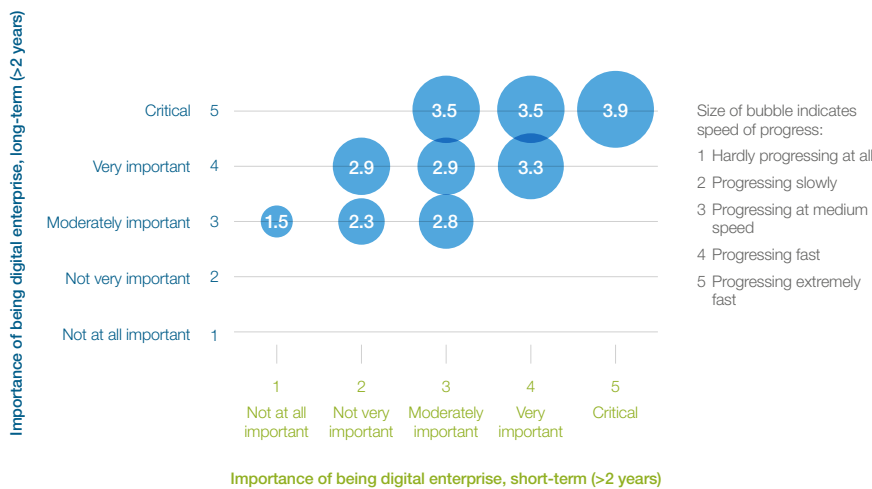
However, as Figure 2 shows, speed of digital progress increases with the perceived importance of digital (both short-term and long-term importance). In other words, companies that best understand the need for digital transformation are those making the fastest progress. (For example, companies that rate digital as critical in both the short term (x axis) and long term (y axis) are moving at an average speed of 3.9 on a 1-5 scale.)

This in itself is no surprise, but the result is that these companies are accelerating away from the rest of the market, and in doing so are gaining increasing competitive advantage and securing a strong position for the future.



**Figure 2 – Digital leaders are accelerating away: digital speed vs. importance**

Q. How important is it to your business that you become a digital enterprise?  
/ Q. How fast is your digital strategy progressing at the moment?



Note: n = 684 (companies for whom being a digital enterprise long-term is of equal or growing importance and is at least moderately important). Bubble size indicates speed of progress on a 1-5 scale (1 = hardly progressing at all, 5 = progressing extremely fast). Source: IDC, 2017.



rate the speed of progress in their digital strategy as "fast".



claim to be progressing "extremely fast".



medium-sized/  
large companies are  
using a hybrid cloud  
environment today.

// Younger consumers often don't own PCs these days. It's predominantly smartphone, then tablet. If we can't connect with them, we're missing their generation. They will also become the older generation of the future. Miss them now and we may never get them.

UK consumer packaged goods company expecting 30% of IT to shift from datacenters into the cloud.

It is worth looking at what companies rate as the most significant success factors in their digital transformation. In particular, success factors identified by companies making the fastest progress.

Although the view is widely held that business, not technology, issues are the most important in determining the success of many IT-mediated initiatives, not just digital transformation, the most influential factor according to respondents is the flexibility and performance of their IT infrastructure. This comes ahead of internal and external business issues such as customer experience and strategic direction.

This is the view across all companies in the survey. However, as Figure 3 shows, when looking at responses by the level of importance companies place on digital and the speed at which they are moving, it becomes clear that IT infrastructure becomes more, not less, important as companies move further along their digital journey.

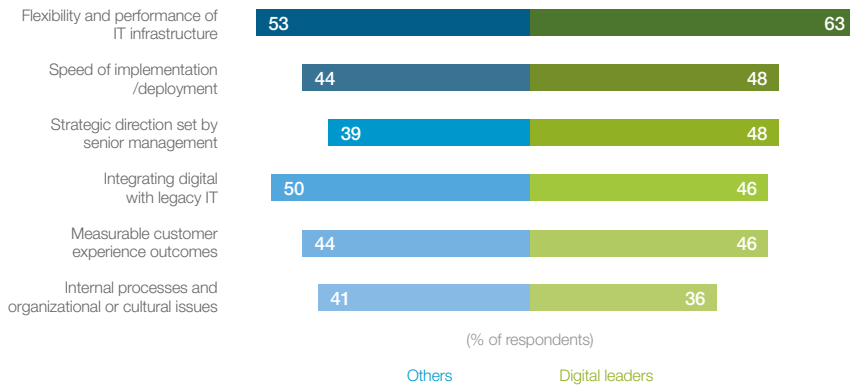
Digital leaders were defined as companies that both place high importance on being digital, and are making fast progress towards that goal. Compared with other organizations in the survey, they clearly value flexible, performant IT infrastructure highly — more of them rank it as a top 3 enabler, but also the gap between it and other factors is significantly greater. It appears that the quality of their IT infrastructure is a stand-out issue for companies furthest ahead in digital transformation.





**Figure 3 – IT infrastructure is a key digital enabler**

Q. What factors are most important to the success of your digital transformation initiatives? Choose top 3.



Note: n = 716 (companies for whom becoming a digital enterprise in the long term is at least of moderate importance). Source: IDC, 2017.





## Hybrid Cloud

Another major shift taking place is the emergence of hybrid cloud, often in support of digital initiatives, but encompassing a wide range of use cases in addition.

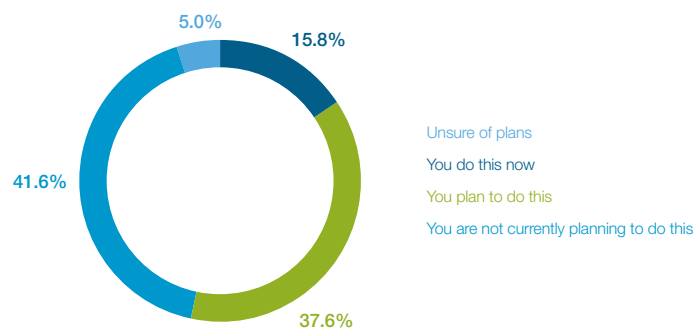
Like digital, hybrid cloud is growing fast. Figure 4 shows that 16% of medium-sized/large companies are using a hybrid cloud environment today, but over the medium-term that figure will more than treble, to the extent that around half of companies actively expect to use hybrid cloud in the near future, firmly establishing it as a mainstream IT architecture.

// The management of the company believes that digital transformation is a matter of survival in the market.

Spanish consumer packaged goods company planning for 15% of IT to be in the cloud at the expense of existing datacenters.

**Figure 4 - Majority of Enterprises prefer hybrid cloud solution**

Q. Do you plan to adopt a hybrid cloud solution?



Note: n = 752 (all companies). Source: IDC, 2017.

// Do not stay on the sidelines of digital.

French transportation company that expects 20% of IT to shift from its on-premise datacenter to a mix of third-party datacenters and public cloud, a typical hybrid cloud scenario.



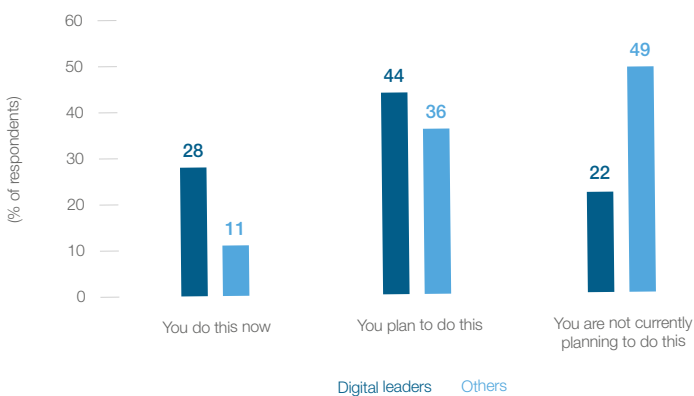
Cloud overall is an important enabler of digital transformation, as it makes IT resources available on demand for projects with little or no capex burden and so facilitates experimentation and agile development. Hybrid cloud, however, is a hugely important platform for connecting existing IT and digital initiatives, for integrating front- and back-office systems in a way that most companies find more palatable than the prospect of moving all IT into the public cloud.

The idea that digital transformation is a major use case of hybrid cloud is reflected in the striking difference in hybrid cloud adoption between digital leaders (as above, companies that place high importance on digital and that are making rapid progress in their digital initiatives) relative to other organizations (Figure 5). Their greater use of digital workloads that live in the cloud, but that increasingly need to interact with core IT systems, is driving hybrid cloud adoption to the extent that the vast majority expect to adopt a hybrid environment over time, far ahead of companies making slower progress.

In addition, like digital overall, hybrid cloud adoption is further ahead in the larger economies, but also the Netherlands, with its highly competitive datacenter, connectivity and cloud markets creating a wide range of options for businesses to construct hybrid environments.

**Figure 5 – Digital leaders use hybrid cloud**

Q. Do you plan to adopt a hybrid cloud solution?



Note: n = 752 (all companies). Source: IDC, 2017.





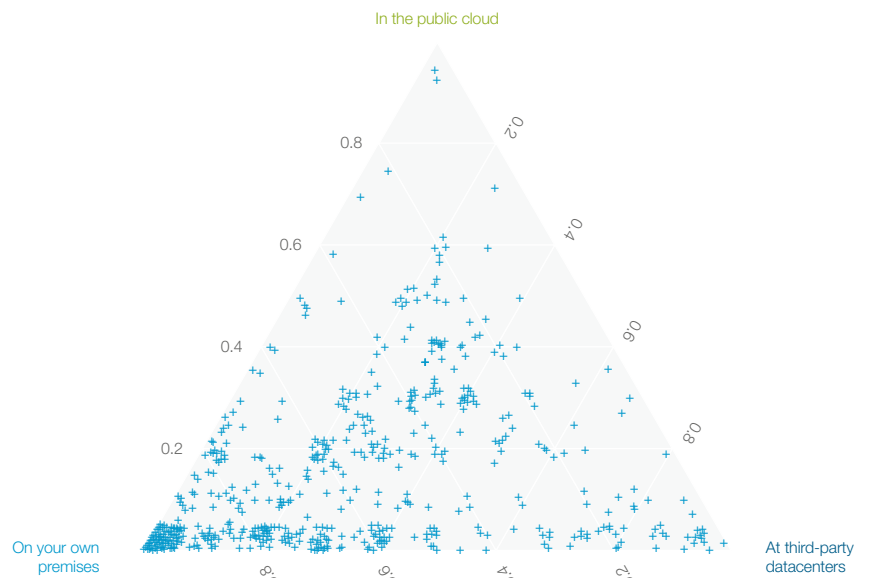
## As companies move to digital and hybrid cloud, IT infrastructure is moving off-premise

Most IT is still housed in companies' own, on-premise datacenters. This is despite a long history of IT outsourcing and managed services spanning several technology cycles, and two decades since the emergence of Internet datacenters and Web hosting services.

In our survey, 722 companies provided a breakdown of their IT housing into their own on-premise datacenter, third-party datacenters (for example colocation), and public cloud providers. Figure 6 shows the positioning of each company according to its IT housing mix. The densest cluster is clearly that close to 100% on-premise, but a large number of companies (along the bottom edge) are on a spectrum between on-premise and third-party datacenters. Some, near the middle of the chart, employ a roughly equal mix of housing options, and barely a handful of companies are predominantly cloud-based.

**Figure 6 – IT infrastructure is mostly on-premise, for now**

*Q. Where do you house your IT infrastructure?*



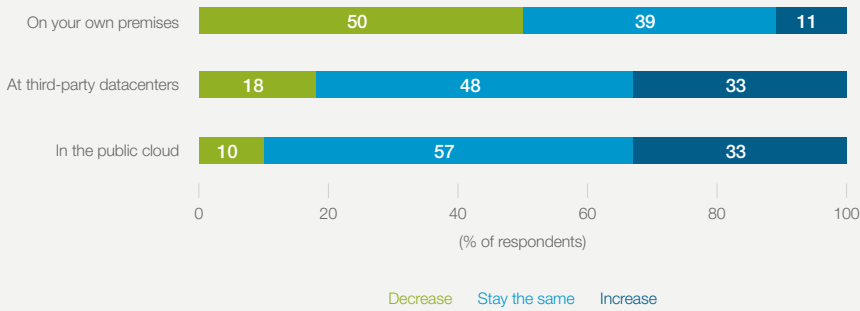
Note: n = 722 (companies that gave a valid response for current IT infrastructure housing). Points are jittered to provide visual separation. Source: IDC, 2017.

This picture is changing, however. Companies are steadily moving their IT off-premise, into both third-party datacenters and the cloud. In fact, as Figure 7 shows, a full 50% of companies expect that the proportion of IT they house in their own datacenters will shrink over the next three years. (This includes a small minority of 3% that expect to stop using on-premise datacenters altogether.)

There is a little more detail behind the chart. The 'stay the same' figures include companies that will keep usage at current levels but also companies that don't, and won't, use that form of housing. For cloud, the 57% figure is made up of 14% of companies that will maintain their current cloud usage and 43% that will remain non-cloud users. On the other hand, the 'increase' figure for cloud comprises 22% who will increase their existing use and 11% who plan to start using cloud for the first time.

**Figure 7 – Half of companies will reduce their use of on-premise datacenters**

*Q. Where do you house your IT infrastructure? / Q. Can you estimate what the split might be in three years' time?*



Note: n = 702 (companies that gave a valid response for now and in 3 years). Source: IDC, 2017.







Overall, the trend is clear: IT is moving to external service providers, both cloud and third-party datacenters. Figure 8 shows how companies expect the composition of their IT housing to change over the next three years:

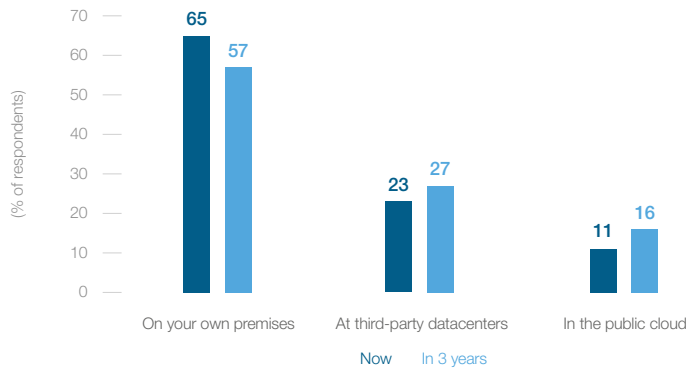
Companies' own facilities will house 8% less of total IT by 2019 (representing a relative shrinking of on-premise IT of 12%). This will include migration of existing workloads (particularly packaged enterprise applications) as well as net-new capacity and workloads being deployed from the start at third-party sites or in the cloud.

Third-party datacenters run by, for example, colocation providers and managed services firms, will account for an extra 4% of total IT (a relative increase of 15%).

Cloud will capture an additional 5% of total IT (representing relative growth of 42%).

### Figure 8 – IT infrastructure is steadily moving off-premise

Q. Where do you house your IT infrastructure? / Q. Can you estimate what the split might be in three years' time?



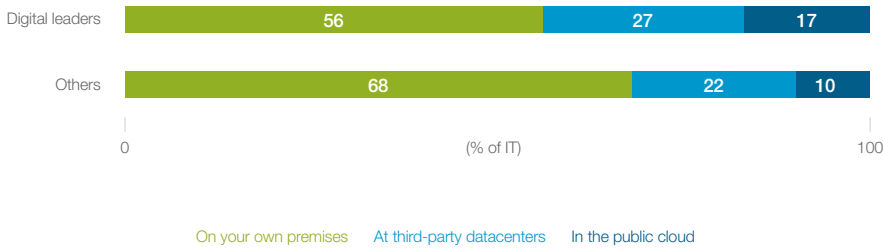
Note: n = 702 (companies that gave a valid response for now and in 3 years. Source: IDC, 2017).

These are significant changes that, if anything, will accelerate as digital transformation and hybrid cloud (as well as Big Data and analytics, social business, mobile apps and other workloads best suited to 'living on the Internet') mature and become the norm. At these rates, on-premise datacenters will become a minority option during the 2020s (and in the UK, France and the Netherlands, respondents expect that will happen even before 2020).

Once more, we can learn from the digital leaders. Figure 9 shows the current breakdown of IT housing for digital leaders versus other organizations, and clearly shows that companies further ahead in their digital transformation make greater use of third-party datacenters and, particularly, the public cloud. In addition, like organizations further behind, they also expect the trend to continue over the next three years.

**Figure 9 – Digital leaders make greater use of third-party datacenters and cloud**

*Q. Where do you house your IT infrastructure?*



Note: n = 722 (companies that gave a valid response for current IT infrastructure housing). Source: IDC, 2017.

The highest rates of third-party datacenter and cloud use (and so the lowest rates of on-premise datacenter use) are seen in the UK, France, Germany and the Netherlands. It is no coincidence that these markets have the highest level of supply of network-neutral datacenters and carrier hotels, local cloud regions, and private access points. These provide a wide range of options for businesses to house their IT externally, either at colocation sites directly, at cloud and managed service providers located in colocation sites, or in local regions operated by cloud, IT and network providers in their own datacenters. Local facilities serve many needs, including performance/latency due to proximity to customers and end users, and data protection compliance and sovereignty, and so companies in these markets have a significant degree of freedom in their choices. As a result, levels of external housing in these countries, although already relatively high, are expected to continue to grow strongly; these active markets show no signs of slowing down. However, companies in other countries are not without choices. Premium datacenters housing domestic and regional cloud and IT service providers exist in every country included in this survey. The options may be fewer in absolute terms in some markets, but the outcomes and benefits to be gained are just as real.

// **Costs and complexity of maintaining our own infrastructure in-house are becoming higher.**

UK transportation company planning to move 25% of IT out of its own datacenters into third-party datacenters and public cloud.

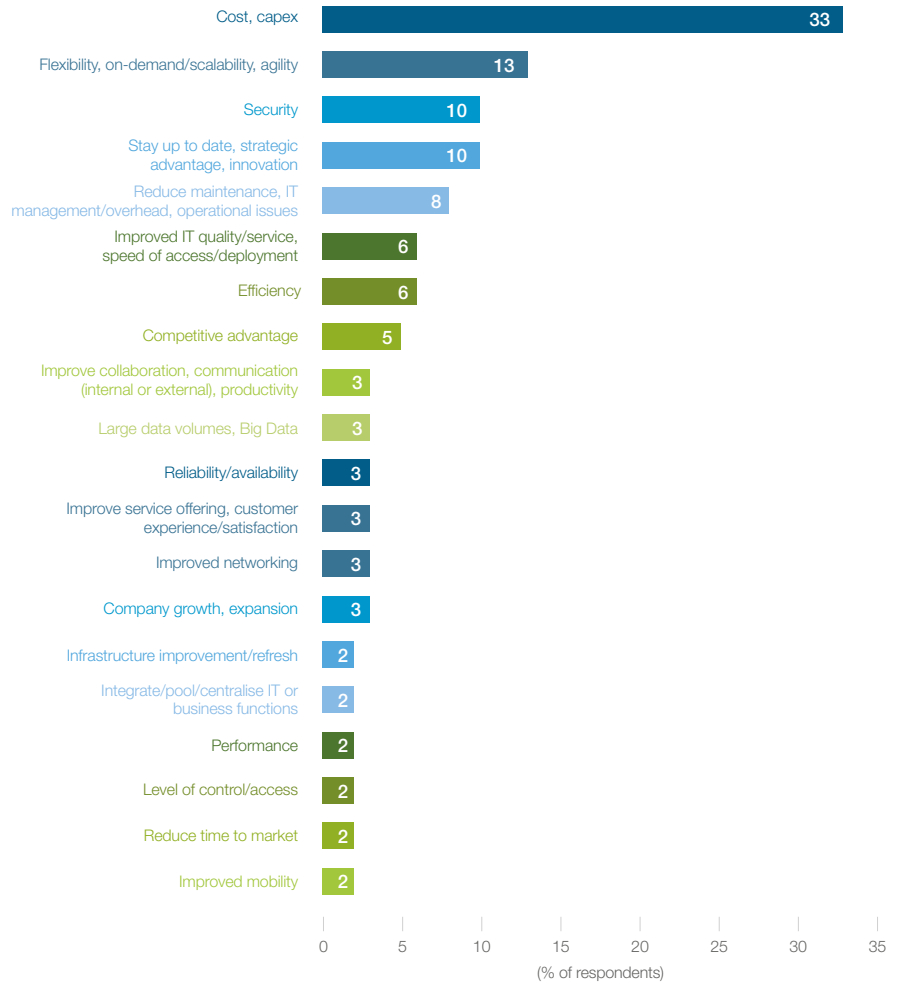




We can see that IT is on the move but to understand what is driving the changes we see, we asked respondents to briefly describe the reasons underlying the changes they reported. After categorising the responses, Figure 10 shows the top 20 reasons given. Most influential overall are cost, flexibility, security, and future-proofing/strategic advantage.

**Figure 10 – Drivers of change in IT housing are rich and varied**

Q. Can you name the main driver(s) of that expected change? Open-ended response.



Note: n = 359 (companies that expect a change in how their IT infrastructure is housed and that gave a valid response). Source: IDC, 2017.



37% of companies moving to cloud identified the need for flexibility, on-demand scalability, and agility as their key driver.

// Maintenance of large amounts of data is really difficult, so that is the reason we are moving to the third-party datacentres.

Danish media company migrating 20% of IT from its own datacenter into third-party facilities.



Cost is clearly the most common reason for changing how IT is housed; it is a (or the) leading driver for a third of companies. Most respondents phrased this as general cost reduction, but many also referred specifically to reducing capex, and some to switching from a capex to an opex model. Interestingly, cost was named as much by companies making a big move towards third-party datacenters as much as it was by companies making a big move towards cloud (defined as +30 percentage points shift in either case), reflecting the difference in overall cost as well as in the cost models between in-house datacenter operation and third-party services as a whole.

The need for flexibility, on-demand scalability, and agility in IT is the second most common driver of change, and again is a relative advantage of external housing in general over on-premise datacenters. However, it is a particularly significant driver for companies moving to cloud, and in fact is the joint-top driver along with cost, both being identified as a key driver by 37% of companies.

Security has traditionally been touted as a fundamental advantage of in-house datacenters: infrastructure is private and under the control of the company's own staff and processes. Despite that, it is the third most commonly cited driver of change in IT housing. This is not, however, due to the 11% of companies seen in Figure 6 who are increasing their use of their own datacenters (i.e. bringing some IT in from third-party datacenters or cloud); few of them cited security as a driver. Neither does it come from companies moving towards cloud. Rather, it is primarily due to companies making a significant move towards third-party datacenters: for them, it is the joint-second most common driver along with flexibility. This reinforces IDC's existing view that IT professionals are increasingly recognizing that premium third-party datacenters provide very high levels of security, more than many if not most corporate datacenters.

A significant number of companies described their change as motivated by the need to stay up to date with broad trends in technology, to prepare for a digital future, and gain strategic advantage or innovation. In other words, to help future-proof their business in a changing world. Like flexibility above, this came predominantly from companies moving towards cloud, for whom it was the third driver, named by 20%, behind cost and flexibility.

## // Decreasing capital expenditure and increasing flexibility.

UK energy production company making a transformational shift with 60% of IT moving from existing datacenters into cloud.

These findings confirm some of the widely-understood benefits of third-party datacenters and cloud, and some of the differences between them. Both sets of benefits/drivers are important, and complement each other in a hybrid cloud setting: flexibility and digital enablement plus security and improved IT quality, with reduced capex from both. In order to build such an environment, a platform is needed that connects private and public clouds in a secure and performant way, which this paper will touch on later.



of companies moving to cloud identified the need to future-proof their company as a key driver.



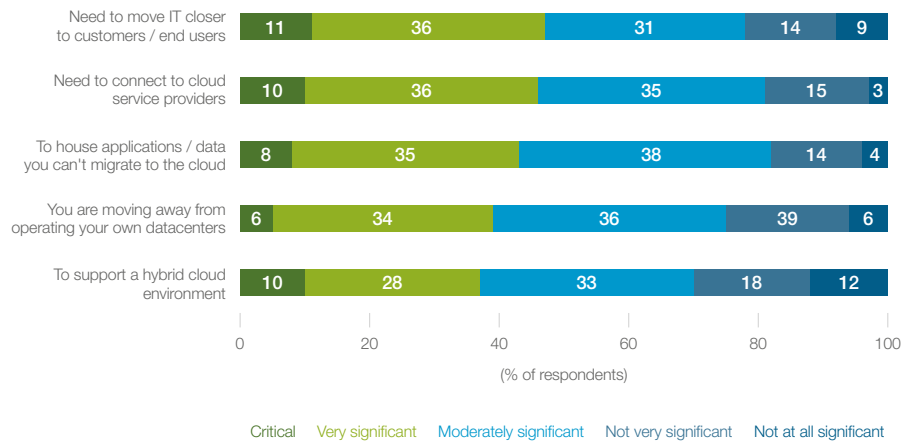
Companies that plan to make more use of third-party datacenters were asked about some specific drivers behind that change (Figure 11). These included proximity (using external datacenters to move IT closer to end users or customers), connectivity to public cloud providers, and hybrid cloud.

Similar numbers of companies rated each driver as important, indicating that third-party datacenters are serving a wide range of needs simultaneously. We see this reflected in the diverse range of customers that many colocation providers have. For example, financial trading and betting companies need proximity to trading exchanges for low latency, enterprise end users and network operators need to connect to cloud providers, enterprise IT departments and IT service providers need to house data and workloads not suited to cloud and to build hybrid environments, and media/social companies need access to content networks and adtech companies, among many other examples.

In other words, ecosystems of diverse service and technology providers are becoming increasingly relevant as more economic and social activity moves online, and independent datacenters are quickly becoming important venues for those ecosystems to exist in.

**Figure 11 – Drivers of third-party datacenters include proximity and cloud**

*Q. You expect to increase your use of third-party datacenters. What are the main drivers for that?*



Note: n = 239 (companies that expect to increase the proportion of IT infrastructure housed in third-party datacenters). Source: IDC, 2017.



## Companies have understandable concerns over using shared infrastructure

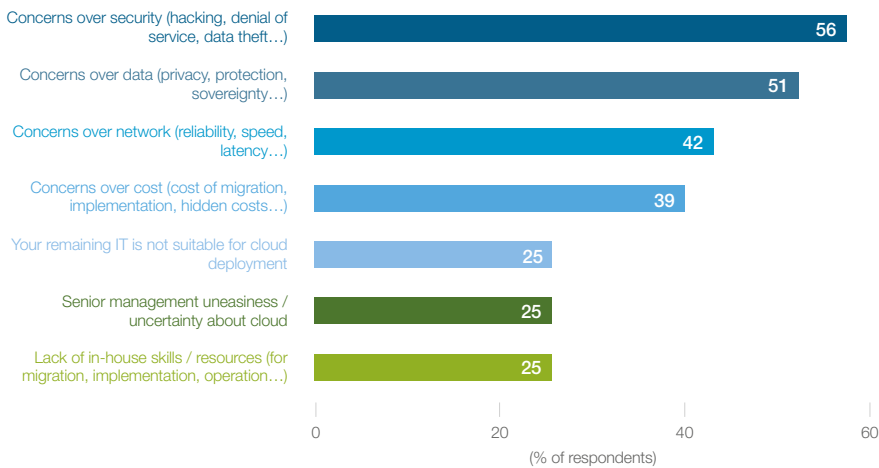
As discussed at Figure 7, 43% of companies don't use public cloud and don't expect to start in the near future. This is a far higher non-use rate than for third-party datacenters (26%) and of course for on-premise datacenters (2%), despite the fact that cloud is now over 10 years old. The standard inhibitors to cloud use are well known, chiefly security and data privacy/sovereignty. Figure 12 confirms these are the biggest barriers to making more (or making any) use of cloud overall, each named by around half of companies (and three quarters naming either or both of them). But concerns relating to network access to cloud services are close behind.

Most accesses to cloud providers are made over the public Internet, incurring the highest risk of poor reliability, latency and overall speed. With the increasing takeup of public cloud seen above, driven by digital transformation and hybrid cloud among many other factors, and the resulting growing expectations that public cloud supports increasingly critical workloads, it is no surprise that the network is now a major concern and barrier to maximising the potential of cloud.



**Figure 12 - Security and data privacy/protection are the dominant cloud inhibitors**

Q. What are the most significant barriers to your organization's use of cloud services? Choose top 3.



Note: n = 752 (all companies). Source: IDC, 2017.



of companies don't use public cloud and don't expect to start in the near future.





Looking specifically at problems with Internet access to cloud services, Figure 13 shows, first, that the vast majority (91%) of companies that use cloud experience at least one significant issue and, second, that security is again the top concern. Some security issues can be addressed with end-to-end encryption, but some are inherent in the architecture of the public Internet, such as breach attempts and exposure to DDoS attack, and are difficult if not impossible to protect against fully.

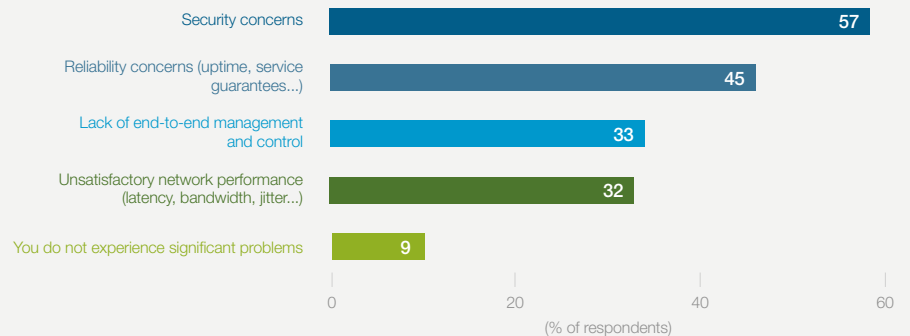
Almost as big a problem is reliability, primarily in the form of network uptime and consistency. Beyond making choices about Internet provider and service options, this is largely out of the customer's control and, where problems occur out on the public network due to congestion, packet loss, excessive network hops, etc., the customer has no comeback with either their Internet or cloud provider. Related to this, lack of end-to-end management and poor network performance are also significant problems that a third of companies experience when accessing cloud services over the Internet.

// With the help of these changes we can focus on our core business activities without losing control of our data, systems, processes or skills.

Swedish manufacturer moving 10% of IT from an on-premise to a third-party datacenter

**Figure 13 – 91% of cloud users have concerns over internet-based access**

*Q. What concerns do you have with Internet-based access to your cloud services? Choose any.*



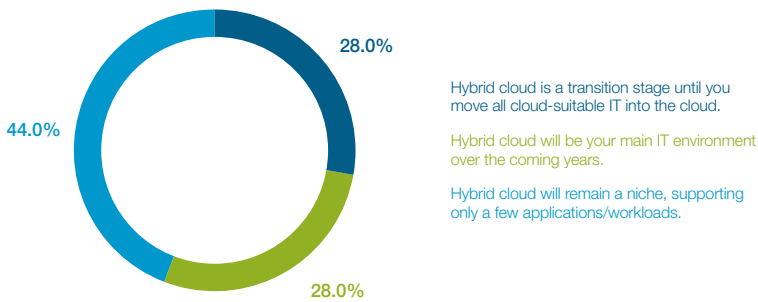
Note: n = 348 (companies that house some IT infrastructure in the public cloud currently). Source: IDC, 2017.

In Figure 4 we saw that hybrid cloud is used by a minority of companies today but that mass adoption is expected in the near future. While the overall take-up of hybrid cloud is rapid, almost half of companies expect to use it only for a small number of workloads (Figure 14). In IDC's view this is partly due to concerns over the shared components of a hybrid deployment (public cloud and public Internet), and consequently many fewer organizations view hybrid as their dominant IT platform in the future. These responses are from companies that use hybrid cloud today and those that don't currently but are planning to. The results differ a little between these two groups, with planners somewhat more likely to view hybrid cloud as a niche environment, and current users split equally between the three viewpoints.

Either way, a large number of companies are not lined up to maximise the significant potential of hybrid cloud. It is quite possible that this is related to the concerns and problems experienced with accessing cloud services over the Internet seen above. If companies perceive or experience security risks or poor performance on the network connecting their hybrid environment together, they're unlikely to put critical workloads into that environment. Hybrid cloud might be limited just to Web applications for example, as opposed to core enterprise applications.

**Figure 14 – Hybrid cloud is key for most, but has greater potential still**

Q. Which best describes your view of hybrid cloud for your organization? Choose one.



Note: n = 401 (companies that currently use or plan to use hybrid cloud). Source: IDC, 2017.



11% of IT is currently in the public cloud.

## But some critical concerns can be addressed, easing the path to a digital and cloud future

Having identified some of the main barriers to more effective take-up of cloud (and by extension full digital transformation and hybrid cloud), we can consider possible solutions and subsequent outcomes.

Survey respondents considered the possible impact on their use of cloud if these barriers were removed; in other words if their concerns over network security, reliability and performance could be alleviated. The result, as Figure 15 shows, is very positive.

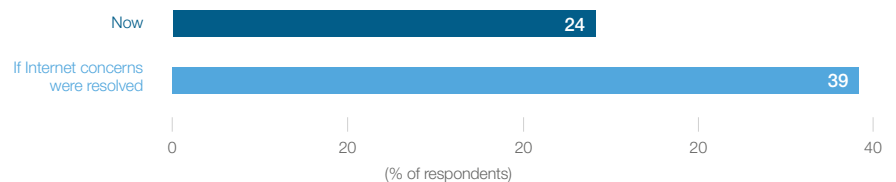
Recall that across the survey sample, 11% of IT is currently in the public cloud (Figure 8). This includes companies that don't use public cloud at all (around half). Among companies that do use public cloud, the proportion of total IT in the cloud is 24%.

These cloud-using respondents estimated that if network-related concerns were resolved, that proportion would increase to 39%, which represents a relative change of 63%. The most important outcome, however, would be the opening up of new opportunities to use cloud platforms for applications that companies wouldn't risk today, to build hybrid cloud environments that could start to take on core enterprise functions, and to maximise the benefits that companies tell us they're looking for by moving toward cloud: flexibility, cost reduction, strategic advantage and preparing for a digital future.



**Figure 15 – Cloud can play a central IT role if the network is fixed**

*Q. Where do you house your IT infrastructure? / Q. You currently put [%] of your IT in the public cloud. If the concerns you have with Internet access to cloud services were resolved, what do you expect this proportion would be?*



Note: n = 253 (companies that house some IT infrastructure in the public cloud currently and that gave a valid estimate of the proportion if concerns over Internet access were resolved). Source: IDC, 2017.



// Fast deployment, attractive price models, cloud environment good for mobile applications.

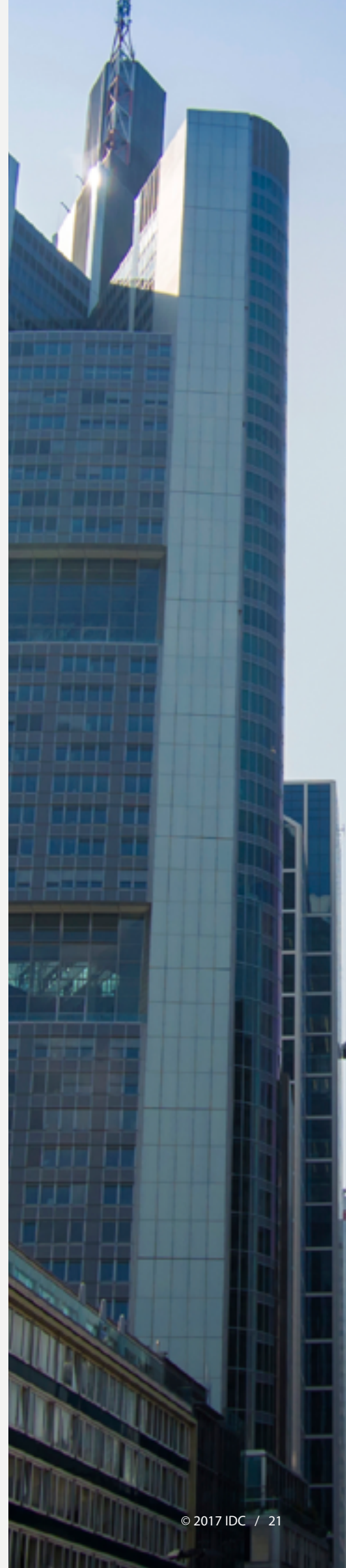
Germany transportation company moving 10% of IT from its on-premise datacenter to the public cloud

How can these concerns be resolved? Five years ago they couldn't be; public cloud providers could only be reached via the Internet. At that point, Orange Business Services launched VPN Galerie for French customers, followed a year later by AWS Direct Connect. Nearly two years after that, within a space of 18 months most large cloud providers, network operators and datacenter companies launched their own cloud connect offerings: AT&T NetBond, Microsoft ExpressRoute, Interxion Cloud Connect, to name a few.

The cloud providers' direct connect platforms have proved popular. Figure 16 shows that around a third of cloud-using companies use one, with Microsoft ExpressRoute the most popular by a small margin.

// Modernization of infrastructure. Change of image. Opening new opportunities.

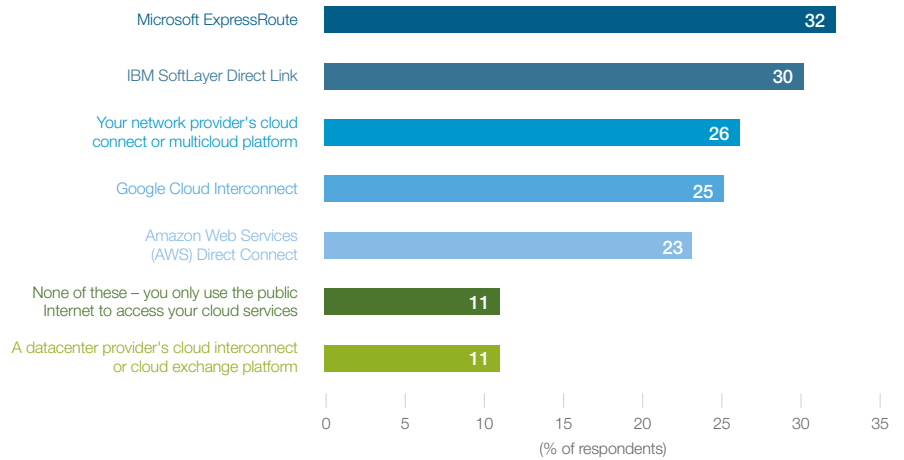
Spanish transportation company expecting IT in the cloud to grow an extra 40%, at the expense of its datacenters.





### Figure 16 – Cloud connect usage

Q. Which of the following alternatives to the public Internet do you use to access your cloud services? Choose any.



Note: n = 348 (companies that house some IT infrastructure in the public cloud currently). Source: IDC, 2017.

They provide a secure, reliable pipe into the cloud provider and so address many of the concerns expressed over Internet-based access. However, they only exist for a small number of the largest cloud providers, and they are specific to that provider, not multi-purpose or shareable. In a sense they are equivalent to traditional telco leased lines, at a time when MPLS VPNs are on the horizon.

In terms of cloud connectivity, what's on the horizon is general-purpose multicloud platforms that provide the same sort of secure, reliable and performant access, but to multiple cloud providers via a single ingress. (In contrast, companies in our survey that use any of the big four cloud providers' direct connects use on average 1.5 of them). They potentially offer cost and convenience benefits, but more significantly they bring multiple cloud providers, as well as the customer's private cloud deployment, into a single environment, which is a good starting point for building hybrid clouds.

The networking challenge associated with implementing hybrid cloud can easily be underestimated. In the absence of a facilitating platform, choices essentially come down to individual cross-connects, cloud provider direct connects, the corporate WAN for the private cloud component, and the public Internet. A multicloud platform removes some of that complexity as well as providing the security, reliability and performance benefits mentioned above. In doing so, IDC believes they will help usher in the next wave of cloud adoption and enable cloud environments to take on ever more critical and demanding workloads, both traditional enterprise and new digital initiatives.

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