

Europe, Middle East and Africa AI and Generative AI Infrastructure Stacks and Deployments

Generative AI (GenAI) is already making a major impact on the digital economy in Europe, the Middle East, and Africa (EMEA). Organizations in many industries are feeling the effects of disruption, which will only increase. Those organizations that manage to prove out their GenAI concepts and move into secure, scalable, and efficient production — whether using private IT or public cloud — will gain a significant competitive advantage. No one can afford to be left behind. IDC's *Europe, Middle East and Africa AI and Generative AI Infrastructure Stacks and Deployments* research program will look at performance-intensive computing (PIC) infrastructure needs in general and GenAI-ready infrastructure requirements in particular across organizations of all types in the EMEA region. The program will cover overall IT infrastructure and datacenter needs and priorities. It will also examine overarching GenAI business and infrastructure needs, strategy, and budgeting; GenAI infrastructure platforms; GenAI vendor perceptions and selection; GenAI deployment preferences; and GenAI efficiency, sustainability impacts, and trends.

MARKETS AND SUBJECTS ANALYZED

- Performance-intensive computing and generative AI infrastructure
- Countries and industries where GenAI is making the largest impact or attracting the most investment
- GenAI adoption by approach to IT transformation and digital maturity
- Preferences for deployment type across private IT, colocation, and public cloud
- Funding sources for GenAI infrastructure from IT and business
- The extent of GenAI use case adoption and GenAI infrastructure investment among organizations classified as Digital Leaders, Digital Mainstream, and Digital Followers

CORE RESEARCH

- Market Analysis Perspective: EMEA AI and Generative AI Infrastructure Stacks and Deployments
- Market Glance 2025: EMEA GenAI Infrastructure Ecosystem
- EMEA PIC and GenAI Infrastructure Survey, 2025
- EMEA GenAI Use Case Adoption by Industry

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: [Europe, Middle East and Africa AI and Generative AI Infrastructure Stacks and Deployments](#).

KEY QUESTIONS ANSWERED

1. How important and disruptive is GenAI to organizations, including the IT organization?
2. Where are GenAI budgets coming from in 2024, and where are they expected to come from in the future?
3. What different attitudes exist to running GenAI use cases in the public cloud, compared with on-premises or private AI?
4. In which types of GenAI solutions are EMEA companies most interested in investing?
5. Which GenAI ecosystem players do end customers see as the most compelling or relevant?

COMPANIES ANALYZED

This service reviews the strategies, market positionings, and future directions of several providers in the EMEA AI and generative AI infrastructure market, including:

AMD, Intel, NVIDIA, Cerebras, Graphcore, Qualcomm, Broadcom, Cisco, Dell, HPE, IBM, Lenovo, Huawei, Super Micro, Microsoft, AWS, Google, Equinix, Digital Realty, NTT, Rackspace