IDC

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From Buzz to Brilliance: Achieving Business Success with AI in Europe

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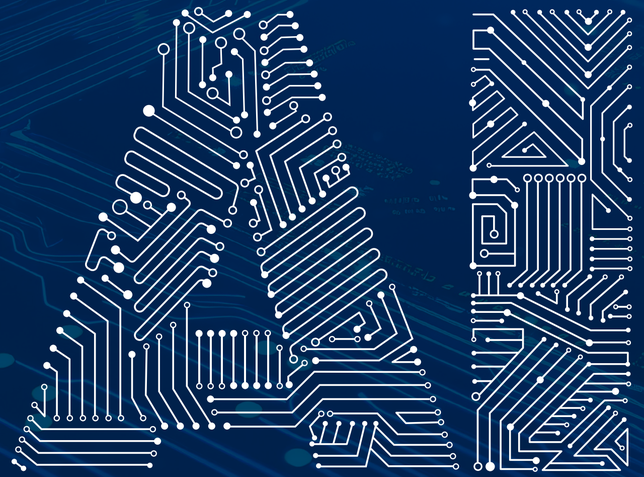
In this InfoBrief

With intelligence increasingly a primary source of value creation across industries, we are on the verge of the "Intelligence Revolution," in which artificial intelligence (AI) and automation-oriented technology have become the main accelerators of business transformation. Against this background, generative AI (GenAI) is emerging as a driving force.

It is critical to remember that although GenAI has created a huge new wave of interest in AI from individuals, businesses, governments, and third-sector organizations, AI use is in fact already widespread. According to IDC's Worldwide Artificial Intelligence Systems Spending Guide (August 2023), which tracks AI software, hardware, and services across industries and use cases, organizations across Europe will invest more than $32 billion in AI solutions in 2023.

This InfoBrief explores how organizations in Europe are using AI today, how they plan to extend the use of AI, the benefits they are achieving, and the challenges they have overcome along the way.



IDC conducted a study of **587 business leaders and decision makers from around Europe** who are responsible for bringing AI transformation to life within their organizations.

IDC also interviewed four large enterprises about their AI strategies and use of AI within their businesses.

This research provides unique insight into the how organizations across Europe are working to deliver business value from AI today.

AI Already Plays a Pivotal Role in How Organizations Operate and Transform

67%
of companies in Europe use AI today.

- AI creates actionable insights from vast datasets, enabling managers and executives to make more informed strategic choices.
- AI helps organizations streamline processes, reduce costs, and gain a competitive edge by automating routine tasks and making predictions and recommendations.
- Increasingly, AI is also powering new experiences for customers, partners, and suppliers, automating content creation, and powering new ways of managing knowledge.

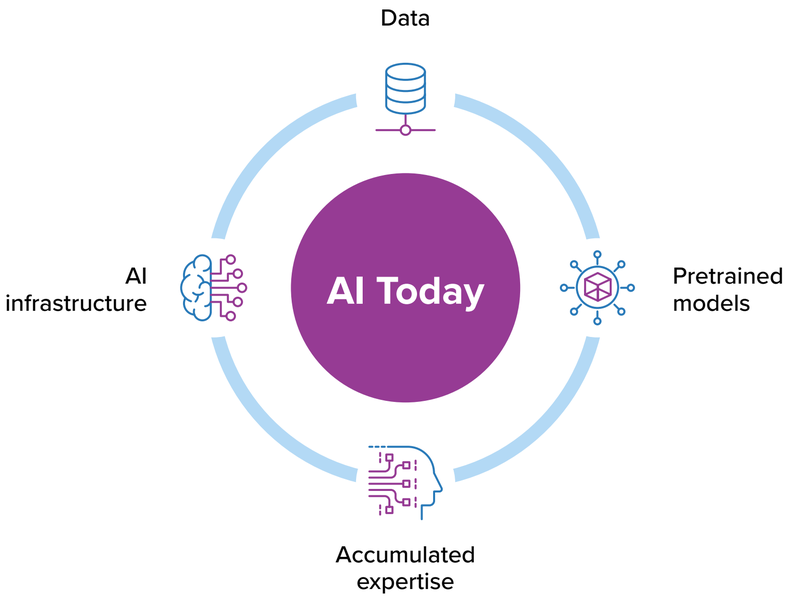
Four related forces are now combining to drive even more growth in businesses' use of AI.

1 **Data:** The digital era is an era of data abundance, providing fuel for AI to power valuable insights and agile responses. As products, services, experiences, and processes become digitalized, they also become instrumented; data is everywhere — for those organizations ready to use it.

2 **Pretrained Models:** Today, organizations can access pretrained models to help power a wide variety of AI-driven use cases, accelerating the AI development process, saving time and resources, and reducing risk. Increasingly, these models can be tuned to the precise needs of specific organizations and use cases.

3 **AI Infrastructure:** Cloud enables businesses to harness huge computing power without the need for substantial upfront investments. Today's cloud providers offer a variety of ways to access infrastructure that is highly optimized for AI workloads. At the same time, the evolution of on-premises infrastructure has further streamlined the deployment of AI applications, simplifying integration into existing workflows.

4 **Accumulated Experience:** By learning from case studies of AI implementations across industries, organizations can now access valuable insights and partners that can be leveraged to deliver on AI's full potential.



Source: IDC's *Business Value of AI Survey*, September 2023, Europe (N = 587)

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Generative AI Takes AI Interest and Capabilities to a New Level

The **huge explosion in generative AI (GenAI) over the last 12 months** has been a strong catalyst for the growth of interest in the broader field of AI. GenAI extends AI's capabilities beyond pattern recognition and prediction to content generation and transformation, vastly increasing the range of possible business use cases. In addition, a fast-growing range of providers now offers pretrained GenAI models that can deliver value "out of the box," or that can be tuned, customized, or integrated with corporate data and processes.

Astoundingly, 38% of companies in Europe believe GenAI has already disrupted, or will significantly disrupt, their business within the next 18 months.

The AI Mix

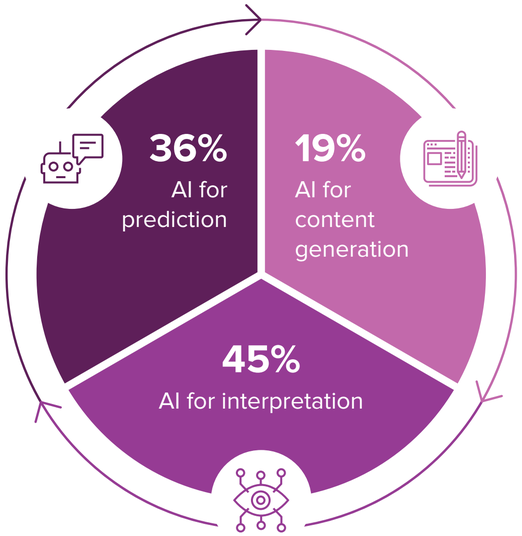
The percentage of companies using each type of AI

This analyzes large data sets to identify long-term patterns in behavior and predict future behavior.

Use cases include predictive maintenance and threat detection.

This analyzes images or event data streams so that people and things can detect, analyze, and act on important events.

Use cases include product-defect detection.



This creates new content, or transforms content, using previously created content as a base.

Use cases include code generation, and conversation or report summarization.

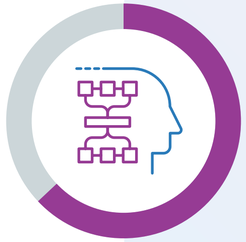
Early GenAI products and services are easy to use and understand, offering accessibility and engagement for individuals without technical expertise, as well as driving excitement about the possibilities, from the boardroom to the shop floor.

22% of companies in Europe are investing significantly in GenAI and have already established spending plans for training, GenAI-enhanced software, and consulting services.

53% are testing and planning, undertaking initial model testing and focused proofs of concept (PoC) and developing lists of potential use cases.

Source: *GenAI ARC Survey*, IDC, August 2023, Europe (N = 379)

AI Investments Target a Wide Variety of Business Outcomes



63% of companies in Europe have an AI strategy linked to business objectives.

To succeed, organizations cannot simply see AI as a novelty or as a "magic wand" that can solve any problem. Organizations must implement AI based on clear business cases, not pursue AI use for its own sake.

Organizations must **clearly align AI efforts with business goals** based on a well-defined AI strategy that considers both how AI can be used to optimize existing processes and operations and how it can unlock business value through innovations in products, services, and/or experiences.

Organizations pursue a spectrum of outcomes through AI initiatives, aiming to boost both efficiency and innovation.

The data shows that organizations do not place emphasis on just one kind of business outcome; they seek widespread benefits from AI investments.

The even spread of these desired outcomes demonstrates the importance of strategic alignment and senior executive engagement — a necessity if organizations are to deliver sustainable value.

Which of the following are the three most important business outcomes that your organization is trying to achieve from AI initiatives? (Top 6 shown)

28% Increased operational efficiency

24% Cost savings

23% Improved business agility

23% Improved customer experience

22% Faster innovation

22% Improved employee productivity

Source: IDC's *Business Value of AI Survey*, September 2023, Europe (N = 587)

AI Is Versatile and Widespread

AI is versatile and can deliver value across all business areas and functions, from augmenting decision making in executive suites to automating routine tasks in operational workflows. Many organizations already use AI across multiple business functions.

Successful organizations use a range of business-value lenses to explore AI-use-case opportunities, while proactively identifying how AI can best serve the unique needs and goals of individual business functions within their respective organizations.

Four Business-Value Lenses for AI Use Cases

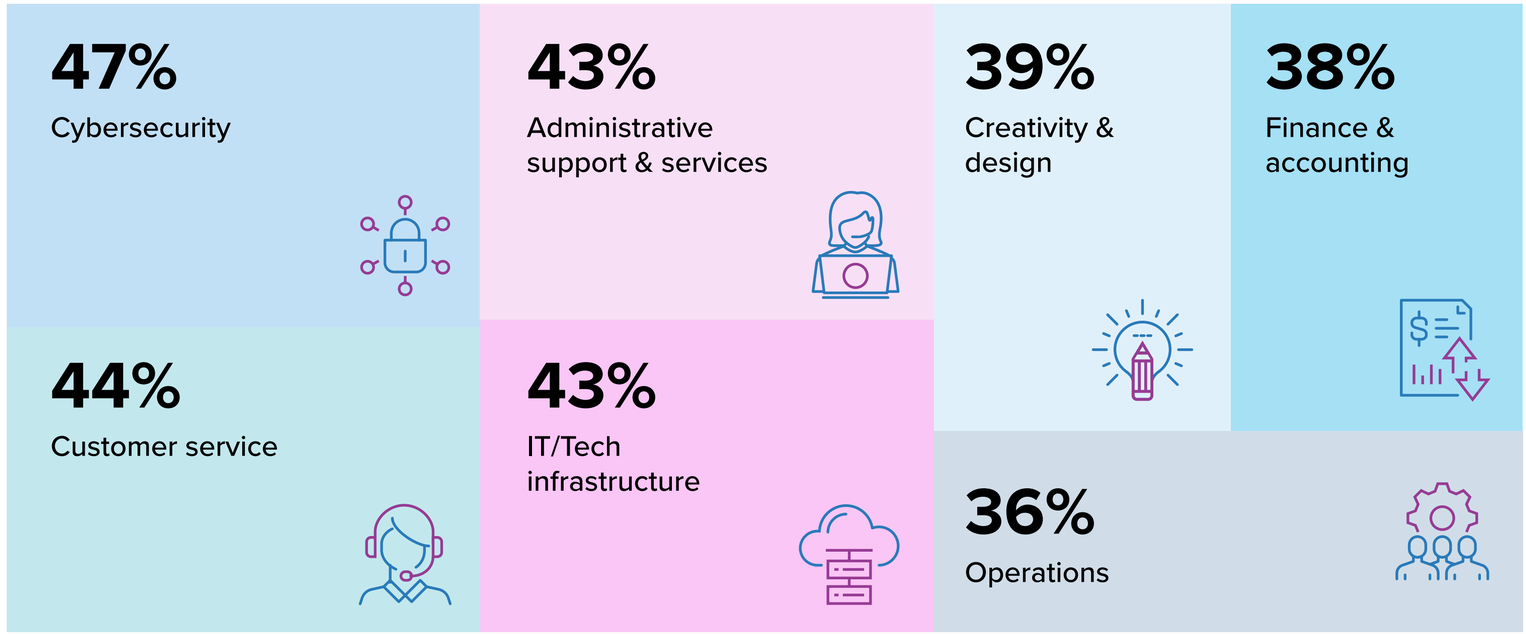
Automation: Streamlining routine tasks to free up human resources for strategic activities

Optimization: Enhancing efficiency and reducing costs through AI's data-driven insights

Modernization: Revitalizing legacy systems with AI to ensure agility and relevance

Innovation: Acting as a catalyst for creative problem-solving and product development

Top 7 Business Functions Currently Leveraging AI

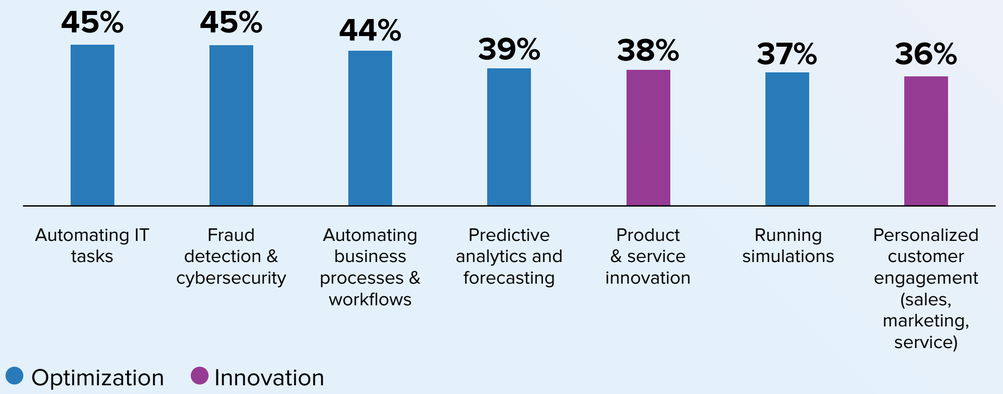


Source: IDC's *Business Value of AI Survey*, September 2023, Europe (N = 587)

Balancing Optimization and Innovation in the Short and Long Term

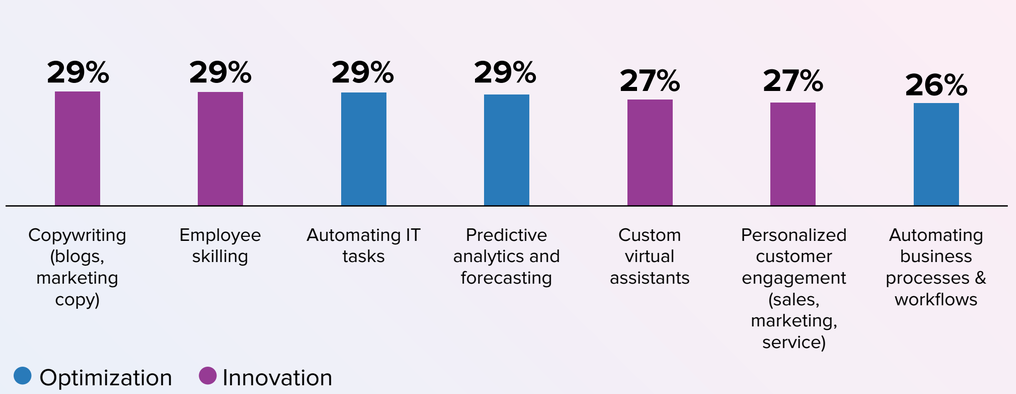
AI's impact on business stems from its ability to both **optimize existing processes** and **stimulate innovation**. Striking the right balance between these two aspects is crucial for companies to thrive. While optimization through AI can lead to efficiency gains and cost reductions, innovation driven by AI can open new market opportunities and revenue streams.

AI Use Cases Today



Today, the top AI use cases focus mainly on driving optimization and business agility. The use cases cited are diverse, but they have a common thread — the need for quick results. In addition, organizations are seeking to balance these use cases with AI applications that drive change and innovation.

AI Use Cases in the Next 24 Months



In the next 24 months, the top AI use cases will widen in scope to stimulate innovation. Copywriting will leverage AI for more nuanced and efficient content creation. Employee skilling initiatives will benefit from AI-driven personalized learning experiences. The rise of custom virtual assistants will offer tailored support across various functions. Customer engagement solutions will leverage, among other things, highly personalized content to improve customer satisfaction.

Source: IDC's *Business Value of AI Survey*, September 2023, Europe (N = 587)

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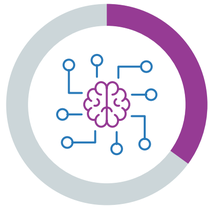
Organizations Are Making Significant Gains With AI

In the face of macroeconomic and geopolitical uncertainty and more challenging competitive environments, organizations have less and less patience: They **demand swift and tangible results from investments**. This is as true for AI investments as it is for others. Many organizations are succeeding in meeting these challenging expectations.



35%

of organizations in Europe typically take **3–6 months** to implement an AI solution.

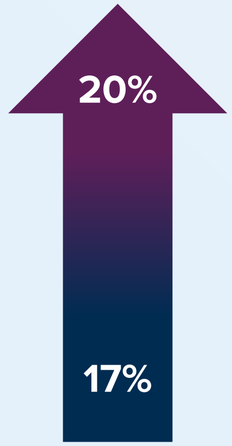
38%

of organizations in Europe saw a return on investment (ROI) from AI projects in **less than 12 months.**

Organizations in Europe declared, on average, a **3.3-fold return** on each dollar spent on AI projects or initiatives.

The improvements are indisputable.

Organizations that have invested in AI over the past year have recorded significant improvements across various areas.



- Stronger competitive differentiation
- Improved business resilience
- Higher levels of customer experience
- More employee productivity
- Improved business agility
- Faster innovation

For some use cases, GenAI projects that utilize pretrained models can deliver value within weeks. Often, though, AI use cases — particularly predictive and interpretive AI use cases — require custom model training, integration, and design. **Striking a balance between swift results and the value that customization can deliver remains crucial for organizations navigating the universe of AI-use-case opportunities.**

Source: IDC's *Business Value of AI Survey*, September 2023, Europe (N = 587)

Cloud Platforms Play Pivotal Roles in AI Implementation

As AI applications become more intricate and data intensive, the importance of minimizing the time, cost, and risk involved in developing and deploying AI increases. For this, **robust and optimized infrastructure** is essential. Cloud platforms commonly come with integrated services to accelerate and simplify AI model development, training, and deployment. This presents a significant advantage for organizations with cloud experience because equivalent services can be challenging to access and deploy efficiently outside of the cloud.

55% of data, on average, in European organizations is kept in the cloud.

65% of organizations in Europe use, or plan to use, cloud to build AI or implement AI via software as a service (SaaS).

26% of organizations in Europe will use cloud platforms to learn about AI, run AI pilot projects and PoCs, build AI test and development environments, and run AI-based production environments.

AI Cloud Stack

Software as a service:
AI-enhanced applications

Platform as a service:
Pretrained models, model hosting platforms, and developer tools

Infrastructure as a service:
AI infrastructure

The Benefits of Cloud Platforms:

Scalability: Easily adjust computing resources based on AI project needs, ensuring efficient resource use.

Cost Efficiency: Use pay-as-you-go models to optimize costs and avoid upfront hardware investments.

Flexibility: Leverage cloud-based resources to enable remote collaboration and resource access.

Advanced Services: Utilize cloud platforms' prebuilt AI models and tools for faster development.

Rapid Deployment: Minimize setup efforts and accelerate AI-model deployment.

Source: IDC's *Business Value of AI Survey*, September 2023, Europe (N = 587); IDC EMEA, Cloud Survey 2023, September 2023, Europe (N = 1,299)

The Benefits of AI Deployments Can Be Huge, But Organizations Also Face Challenges

The three main challenge categories are **access to skills and expertise, responsible AI implementation leveraging quality data,** and **making effective business cases** for AI investment.

Lack of Skills

35% of companies **lack employees with the skills** needed to learn and work with AI, and **31%** lack specialized personnel with AI implementation skills.

Addressing this challenge means training existing staff to acquire AI expertise or partnering with external providers to source specialized skills, particularly in data science, data engineering, and AI model development. Encouraging a culture of ongoing learning and collaboration within the organization will ensure the sustainability of AI capabilities, aligning skills development with AI advances as the technology evolves.

Need for Responsible AI

27% of companies **worry about data or IP loss** in AI projects, and **24%** lack data governance.

Addressing these challenges involves implementing strong data governance and security practices. Organizations must design measures to protect sensitive information throughout each AI project's life cycle. Following best practices, such as data anonymization and encryption, adds an extra layer of security. Organizations can also reduce risks by training AI models using their own data, instead of sharing sensitive information externally. Promoting awareness and compliance among employees involved in AI initiatives is vital. Collaborating with trustworthy AI vendors and experts that prioritize security will further enhance data protection.

Alignment with Business Objectives

28% of companies are **concerned about the cost of AI**, and **19%** struggle to make a compelling business case for AI.

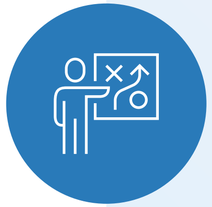
Organizations that invest in AI use cases designed to deliver quantifiable business outcomes and that clearly measure the progress of objectives will find business-case creation and cost issues easier to handle. Allocating dedicated budgets for AI initiatives, implementing cost-control measures, and developing expertise in managing AI-related expenses are also key. Adopting an incremental approach to building AI solutions will improve cost predictability and risk management.

Source: IDC's *Business Value of AI Survey*, September 2023, Europe (N = 587)

VOLVO

Case Study: Driving AI Value at Scale with Products and People

Founded in 1927, Volvo Cars has created a strategy that prioritizes safety, sustainability, and customer-centricity. With a growing direct-to-consumer (D2C) business and an accelerated drive to electrify its portfolio, the company has placed data, analytics, and AI at the core of its technology strategy — and it is insourcing its software development accordingly.

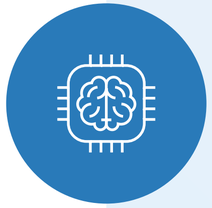


Clear Strategy Alignment

Volvo Cars has taken a holistic approach to its data, analytics, and AI priorities and the company's overall strategic business direction. To engage business teams in AI use cases, the company selects from various optimization and innovation priorities, and business and technology teams collaborate on their delivery and support, with a shared understanding of how the business will monitor and quantify their success over time.

Delivering AI at Scale with Foundations for Products and Teams

Volvo Cars has been delivering value from data, analytics, and AI for some years. It has developed an operating model based on a central strategy and platform team, providing services to a set of technology delivery "hubs" and "spokes" embedded within business teams, worldwide.



A Structured Approach to GenAI Exploration

To capitalize on GenAI interest among the company's thousands of engineers, the organization set up a central GenAI steering committee, which required business teams to propose use cases for experimentation, along with clear experiment success criteria. By tracking the progress of these experiments over a three-month period, Volvo Cars has been able to create clear focus areas for larger investments, as well as collecting insights about the GenAI risks and challenges to be managed.

Key to Success:
A Data Platform

Volvo Cars is already leveraging AI in multiple parts of its business, but it realizes that data must be brought together from multiple parts of the organization for the most strategic AI use cases to deliver value.

Achieving this requires a **strong enterprise-wide platform** — one that makes **data discoverable, accessible, understandable, and interoperable** and enhances **business and IT collaboration**.

As a result, as well as continuing to capture value from discrete AI use cases, Volvo Cars is transforming its data strategy to emphasize **data products**, rather than seeing data as a business byproduct.

IDC Interview with

Ronnie Jansson
Head of Data & Analytics Solutions, Volvo Cars

Case Study: Responsibly Mastering AI for Omnichannel Success

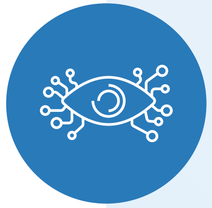
A Spanish retailer with a vast customer base and numerous sales points is leveraging AI to create a transformative omnichannel experience for customers. The company sees AI as a powerful force — one that is already impacting the retailer's market in tangible ways.

Technology as the Cornerstone

The company's technology strategy is built on the fusion of data, analytics, and AI. The arrival of ChatGPT and GenAI APIs has triggered AI investment growth, and the company is exploring both internal and external use cases. External use cases, such as conversational assistants harnessing customer data, are pursued with an innovation mindset and a willingness to take calculated risks. Internal use cases, focused on productivity enhancement via software development tools such as GitHub Copilot, are less visible but still impactful.

Attracting Talent with AI, Agile IT, and Business Partnering

The company adopts an agile approach to IT and business collaboration, placing significant emphasis on joint sign-offs and AI projects supported by robust business cases. The company firmly believes that a shortage of expertise should not impede AI investment. Furthermore, it recognizes that the more AI projects it undertakes, the more AI talent will gravitate to the company. The organization is trying to achieve agility by working with tech partners and is exploring open-source options.



A strategic Vision and Responsible AI

The retailer believes not adopting AI would place it at a competitive disadvantage. The company foresees a shift from using publicly available model APIs to training smaller models, fine-tuning open-source models, and even attempting to build its own large language models.

Responsible AI is a core principle and is central to establishing trust from the outset and to building customer confidence. The company acknowledges that, without trust, AI products and services will not gain traction in the market.

Keys to Success:

Leadership Involvement and Risk Management

C-suite leaders at the retailer play a pivotal role in driving AI initiatives, **offering focused support based on clear business cases**.

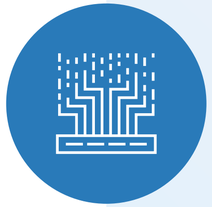
There is **an appetite for calculated risk**. All ideas undergo **thorough verification for security, intellectual property rights, and responsible AI use**.

The ultimate goal is to create a new business model, and a modern data platform — a unified foundation for future projects — is the next step.

illimity

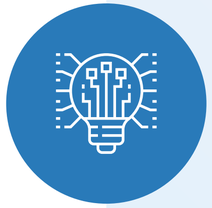
Case Study: Pioneering AI-Driven Banking for Future Growth

illimity, a banking industry pioneer from Italy, is among the first fully digital cloud-native and data-driven banks for SMBs and retail customers. In just nine months of existence, illimity has built an internal AI technology platform, modeling the approach that tech companies, not traditional banks, commonly take. The cloud-based platform integrates third-party solutions, enabling agile and rapid product and service development.



The Transformative Potential of AI

illimity has recognized AI as a game changer. It views AI as a gateway to a new business operating model, stressing AI's role as a "sparring partner" for decision makers and in proposing novel recommendations and creating opportunities to deliver unique value to customers. The company emphasizes the importance of strong data architecture as an AI enabler because it allows various stakeholders to simultaneously access data for swift decision making.



Innovative AI-Enabled Products

illimity's strategy goes beyond just adding AI to existing offerings. It aims to develop entirely new AI-enabled products and services, impacting product lines, operational processes, and customer experiences. Such a comprehensive approach has led the company to develop an internal platform for experimenting with AI, integrating AI capabilities, and screening for compliance, with a focus on innovation and reaction time in rapidly evolving financial markets.

The Future Role of AI

illimity envisions AI as a natural addition to its current activities. The goal is to leverage AI to enhance human capabilities, better understand customer needs, and facilitate the development of new products. illimity sees AI as a key tool for achieving a competitive edge, particularly for a bank operating with smaller budgets than its competitors. The emphasis is on creating a symbiotic relationship between humans and AI — ultimately, driving business growth.

Keys to Success:

Company Skills and Company Culture

Despite the advantage of being legacy free, the company faces challenges in ensuring AI explainability and transparency and in overcoming internal resistance.

illimity recognizes the significance of **skills, culture, and mindset**, identifying the need for employees to **perceive AI as a partner** and not as a threat. illimity acknowledges the importance of human involvement in the AI development process and emphasizes responsible-AI practices. Overcoming resistance and **fostering an open mindset among employees** are essential components of its strategy.

IDC Interview with

Filipe Teixeira
Chief Information Officer, illimity

Case Study: Navigating AI Integration in Pharma for Efficiency and Innovation

Novo Nordisk's AI deployment seamlessly extends from its analytics implementations. Novo Nordisk has adopted a decentralized model, with no central AI team. The primary objective is to enhance efficiency, particularly in generic business functions, but with innovation remaining a core focus of research teams dedicated to product development.

Aligning AI Initiatives with Business Needs

Novo Nordisk's digitalization strategy is centralized and led by IT. AI initiatives, however, are integral to lines of business. Optimizing available data, Novo Nordisk takes a targeted approach to business challenges, identifying the business needs and ensuring purposeful and effective integration of AI into operational contexts. AI is considered a problem-solving tool, and implementations are generally initiated by business teams, supported by IT.

Data and a Heightened Need for Quality

Novo Nordisk has a distributed and siloed data landscape, which is a potential hurdle for AI implementations. Novo Nordisk recognizes the need to align its data strategy with AI requirements and acknowledges the amplified importance of superior data quality in the AI era. Data strategy alignment is especially challenging for research teams in the company, as they rely on external data sources.

Building Trust in a Regulated Environment

The pharmaceutical industry's stringent regulatory environment amplifies AI-related trust challenges, and its conservative nature, driven by regulatory constraints, influences the openness of organizations to AI adoption. To build trust in a such a highly regulated sector that relies on highly sensitive data, AI outcomes must be validated.

Keys to Success:

Employee Skilling and Business Alignment

Business teams require access to AI capabilities. Recognizing the unique demands of the industry, **Novo Nordisk is investing in AI education for science experts** within research teams.

AI is not considered a revolutionary replacement for current solutions but as a powerful addition to existing tools — one particularly useful for solving complex issues.

Novo Nordisk employes a three-step approach to AI implementations: **pinpointing problems, assessing AI's ability to resolve these problems, and identifying potential limitations**, including data considerations.

IDC Interview with

Lars Fogh Iversen
Senior Vice President, Digital Science & Innovation, Novo Nordisk

C-suite Leaders Are Critical to Sustainable Success with AI

To drive sustainable success with AI, C-suite leaders must play active roles in:

- **Driving AI strategy and ensuring alignment with the organization's overarching business vision and mission**
- **Fostering a culture of innovation and adaptability across all layers of the organization**
- **Collaborating with IT leaders, championing AI implementation, and recognizing AI as a strategic asset**
- **Steering and encouraging responsible AI adoption**

Top 5 Corporate Values of Today

- Trustworthiness
- Innovation
- Respect
- Customer-centricity
- Agility

Build on a foundation of trust and accountability to foster rapid growth and a sense of empowerment.

Top 5 Corporate Values of Tomorrow

- Experimentation
- Speed of execution
- Flexibility
- Growth mindset
- Empowered

C-suite leaders must embrace new values — without letting go of current values!

Experimentation and innovation:

Corporations infuse experimentation into their culture by creating designated spaces for testing and learning, encouraging cross-functional collaboration, and celebrating small wins. Integrating experimentation cycles, fostering a continuous improvement mindset, and investing in research and development will enable innovation to thrive.

Speed of execution and agility:

Speed and agility can be enhanced by streamlining decision-making processes, embracing agile methodologies, and leveraging technology to accelerate communication and workflow. Continuous learning and adaptability ensure that the organization remains nimble and responsive to market changes.

Growth mindset and flexibility:

Cultivating a growth mindset involves promoting a learning culture in which challenges are viewed as opportunities to develop and improve. Flexibility can be embedded by promoting diverse perspectives, encouraging open communication, and allowing for iterative approaches in problem-solving.

Empowerment and respect:

Empowering employees involves providing them with the autonomy to make decisions, fostering a sense of ownership, and recognizing and rewarding individual contributions. A culture of trust and respect supports empowerment, as employees feel confident in taking calculated risks and contributing meaningfully.

Source: IDC's *Business Value of AI Survey*, September 2023, Europe (N = 587)

Six Steps to Successful AI Adoption

IDC recommends the following practices for adopting AI and realizing significant business value from it.

1. Establish an AI council of senior executives to guide your organization's AI adoption.
2. Develop a responsible-AI policy.
3. Reskill and upskill your employees with AI knowledge.
4. Allocate sufficient budget for your AI initiatives.
5. Collaborate with technology suppliers to optimize cost throughout the AI life cycle.
6. Identify AI projects that align with your business objectives, and then get started.

A Roadmap for Capturing Business Value with AI

	Experimentation *(usually within the first 3–6 months)*	Implementation *(usually 6–12 months)*	Optimization *(usually after 12 months)*
Strategy	Clearly define business objectives and align AI initiatives with overall company goals.	Create a strong business case for AI adoption by testing diverse use cases to refine your strategy. Establish KPIs and effective measurement mechanisms to monitor the impact of your AI initiatives.	Iterate and enhance AI strategy based on learnings and market dynamics.
Responsible AI	Establish responsible AI guidelines and integrate them into AI development processes and usage policies.	Implement a comprehensive AI governance framework to manage risks and ensure compliance. Provide essential tools and resources for the practical application of this framework, facilitating the integration of guidance into everyday practices.	Conduct regular audits of AI systems for ethical implications, quality checks, and algorithmic biases.
Skills	Build a robust knowledge foundation by upskilling existing teams. Identify key AI vendors for a comprehensive approach that combines internal expertise with external support.	Facilitate knowledge transfer between IT and business teams through cross-functional training for seamless AI skills alignment. Ensure common ground for successful projects and expedite adoption by identifying preferred partners.	Encourage the development of AI expertise and specialization to enable AI implementation at scale. Harness a variety of specialized services from your partner ecosystem to deliver ultimate results.
Budget	Allocate sufficient resources for AI projects, considering both technology and talent.	Adjust AI financing strategies, balancing resource allocation with risk appetite, to ensure the adaptability and effectiveness of AI projects, while carefully managing the budget balance between off-the-shelf and customized solutions.	Review and optimize the AI budget based on project outcomes and evolving business needs, carefully vetting the budget split between buy and build approaches.

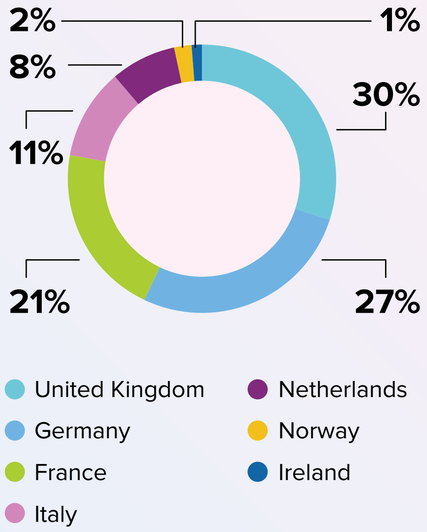
IDC Research Used in this InfoBrief

This IDC InfoBrief is based on new as well as existing primary research in 16 European countries: Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, and the United Kingdom.

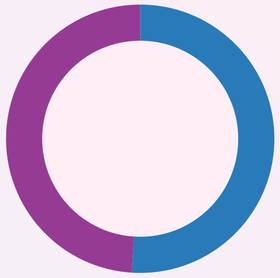
IDC's *Business Value of AI Survey*, September 2023

IDC conducted primary research among 587 business leaders and decision makers from several countries in Europe. All respondents are responsible for bringing AI transformation to life within their organizations. The surveyed companies have 1,000 or more employees.

Countries



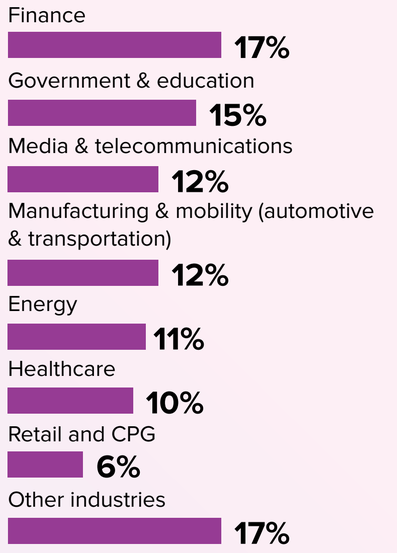
Job Roles



Interviewed job level:

- Senior executive level (CEO, president, CIO, CSO)
- Executive level (general manager, executive vice president, executive director)
- Upper-level management (senior vice president, vice president, senior director)

Industries



Additional IDC Research

IDC's *GenAI Awareness, Readiness, and Commitment Survey,* August 2023, conducted among 379 organizations from 8 European countries (Denmark, Finland, France, Germany, Italy, Norway, Sweden, and the United Kingdom)

IDC's *Cloud Survey, September 2023*, conducted among 1,299 organizations from 14 European Countries (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Italy, Netherlands, Portugal, Spain, Sweden, Switzerland, and the United Kingdom)

About the IDC Analysts

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Research Director
Cloud in Europe, IDC

Ewa Zborowska joined IDC CEMA in January 2003. As a research director in the IT services group, Ewa focuses on research of the Polish services market.

Prior to joining IDC, Ewa worked for the Main Statistical Office and held the post of tender specialist at an IT company.

Ewa Zborowska holds an MA in business administration (specializing in marketing) from the University of Lodz, Poland.

More about Ewa Zborowska

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Research Vice President
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Neil Ward-Dutton is vice president, automation, analytics, and AI at IDC Europe. In this role, Neil guides IDC's research agendas and helps enterprise and technology vendor clients alike make sense of the opportunities and challenges across these very fast-moving and complicated technology markets. In a 28-year career as a technology industry analyst, Neil Ward-Dutton has researched a wide range of enterprise software technologies, authored hundreds of reports, and regularly appeared on TV and in print media.

More about Neil Ward-Dutton

Carla Arend

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Carla Arend heads IDC's European cloud research. Carla provides industry clients with key insight into market dynamics, vendor activities, and end-user adoption trends in the European cloud market. As part of her research, Carla Arend covers such topics as how European organizations are adopting cloud, how cloud drivers and inhibitors are evolving, changes in cloud strategies, and how to realize the business value of cloud.

More about Carla Arend

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