

Enterprise AI For Competitive Advantage in a Data-Driven World: A View from the C-Suite

Simplifying and Derisking AI Use Cases for Transforming Enterprises



Dave Pearson
Research Vice President,
Storage and Converged Systems,
Worldwide Infrastructure Research, IDC

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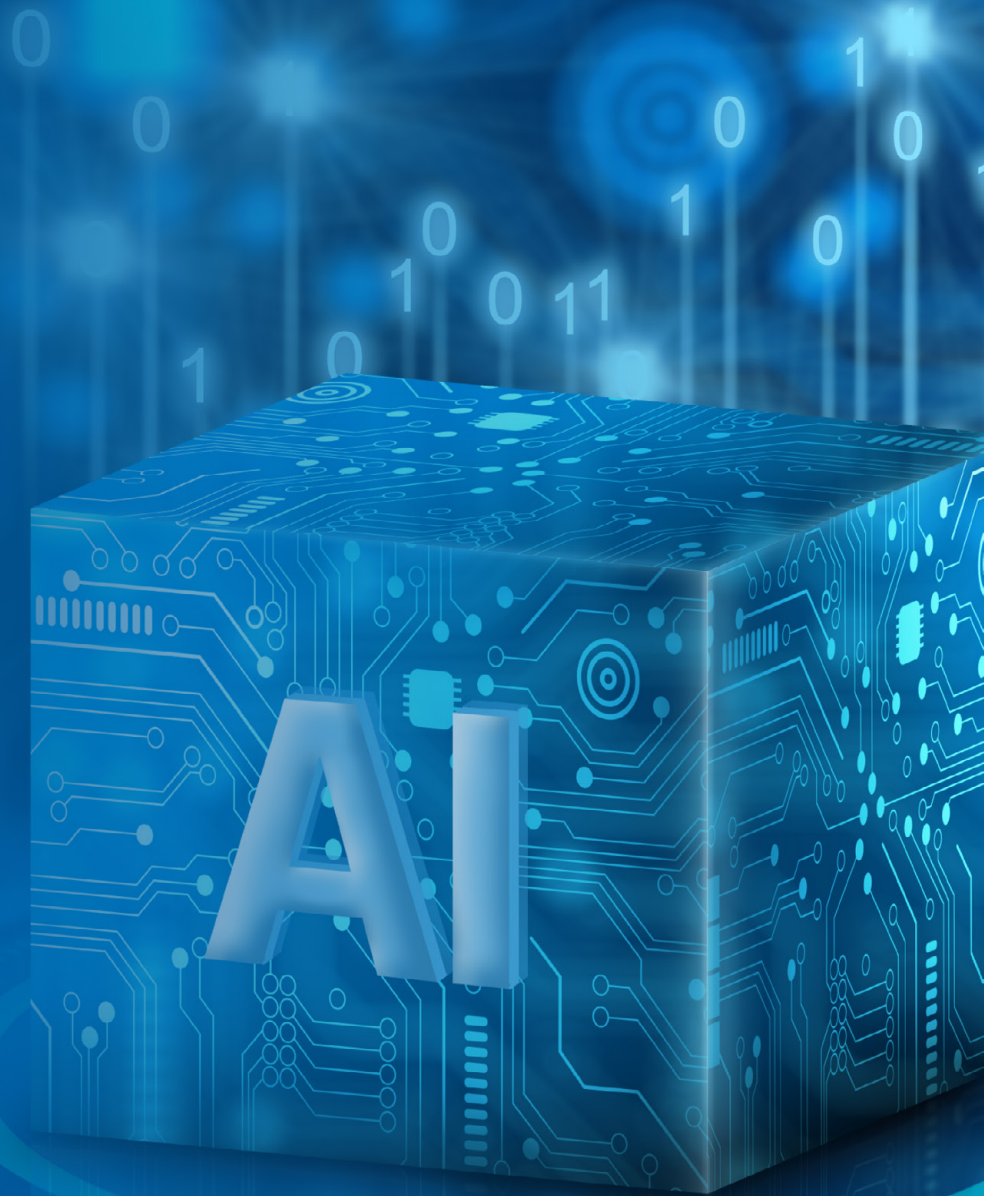
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Executive Summary

IDC research indicates that as enterprises advance their digital business capabilities, the focus is increasingly shifting toward realizing measurable value from AI initiatives rather than experimentation. Anticipated benefits include process optimization, expanded automation, and the enablement of new digital business models. **The rapid emergence of generative and agentic AI is serving as both a disruptive and transformative force, pushing organizations to invest or fall behind their competition.** Executive leadership across industries identifies AI as a top growth driver in 2025 and 2026, requiring it to be a leading area for new infrastructure investment. However, demand can be uncertain or erratic; skilled resources are difficult to find, hire, and retain; and costs can be both high and unpredictable.

Enabling AI through a unified, integrated platform, particularly one with integrated security, governance, and data management capabilities, can deliver measurable value. While most organizations are still in the process of building out these foundational platforms, investment in modern, scalable data systems remains a critical priority. Security; cost control and predictability; simplicity; and compliance with governance, privacy, and data sovereignty regulations are all key capabilities. Digital leaders who have already deployed robust platforms are better positioned to integrate advanced AI capabilities and are realizing tangible advantages over less mature peers in terms of agility, innovation velocity, and market responsiveness, leading to better business outcomes.



The C-Suite Continues to Be the Primary Driver for AI Initiatives

IDC research indicates that as enterprises advance their digital business capabilities, the focus is increasingly shifting toward realizing measurable value from AI initiatives rather than experimentation.

Anticipated benefits include process optimization, expanded automation, and the enablement of new digital business models to reach or create new markets and drive revenue. Some **36.8%** of organizations have an AI COE that directs AI transformation based on C-suite directives.

Top C-suite priorities include:



Security and Cost

Security, cost, and model accuracy are the top C-suite concerns; however, developing new business models and cost savings saw the largest growth in importance.



Adoption

Organizations are focused on how AI will impact their business in terms of productivity, experience, and revenue.



Strategy

Only **2%** of organizations have not developed a strategy or road map for AI initiatives, yet **46%** still think a lack of skills is the main challenge when it comes to implementing that strategy.



Responsible AI

Some **75%** of C-suite respondents view responsible AI as a critical priority for themselves and their organizations. Data privacy concerns, governance, and data sovereignty are top challenges in this area.

n = 885; Source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 5*, May 2025. n = 1,015; Source: IDC's *2024–2025 Global IT Skills Survey*, December 2024

AI Success Is Found at the Intersection of C-Suite Strategies and IT Decision-Making

Integrating AI into a transforming business requires an enterprisewide strategy, a clear road map, the right infrastructure choices, and efficient, secure, compliant operations — backed by an imperative from the C-suite and buy-in from IT, legal, finance, and business units.



n = 956 (2024), n = 895 (2023); Source: IDC's Worldwide C-Suite Tech Survey; IDC's CEO Study, 2024

Optimizing AI Infrastructure Tops Areas of Focus for 2025

Supporting goals of improving operations, performance, efficiency, security, and compliance

Most important areas of focus for 2025 to move beyond GenAI experimentation, enabling broader adoption of AI across business and IT stacks:



AI infrastructure: optimizing compute, storage, network, and cloud resources to support secure AI workloads cost effectively

48%

AI-ready workforce: creating a developer/general workforce that uses AI assistants, advisors, and agents to boost business success

45%

AI strategy: creating a prioritized use-case road map tied to key business objectives

45%

AI-ready data architectures: enabling easy but controlled access to the entire data estate (structured, unstructured, and event streams)

40%

The most important goals driving your AI infrastructure efforts:



Using AI to improve infrastructure operations, performance, and efficiency

48%

Ensuring consistent data security and compliance across locations and AI workloads

47%

Reducing the cost and complexity of AI-related data transport and storage

31%

Adding infrastructure to improve inferencing quality (e.g., RAG and prompt engineering)




31%

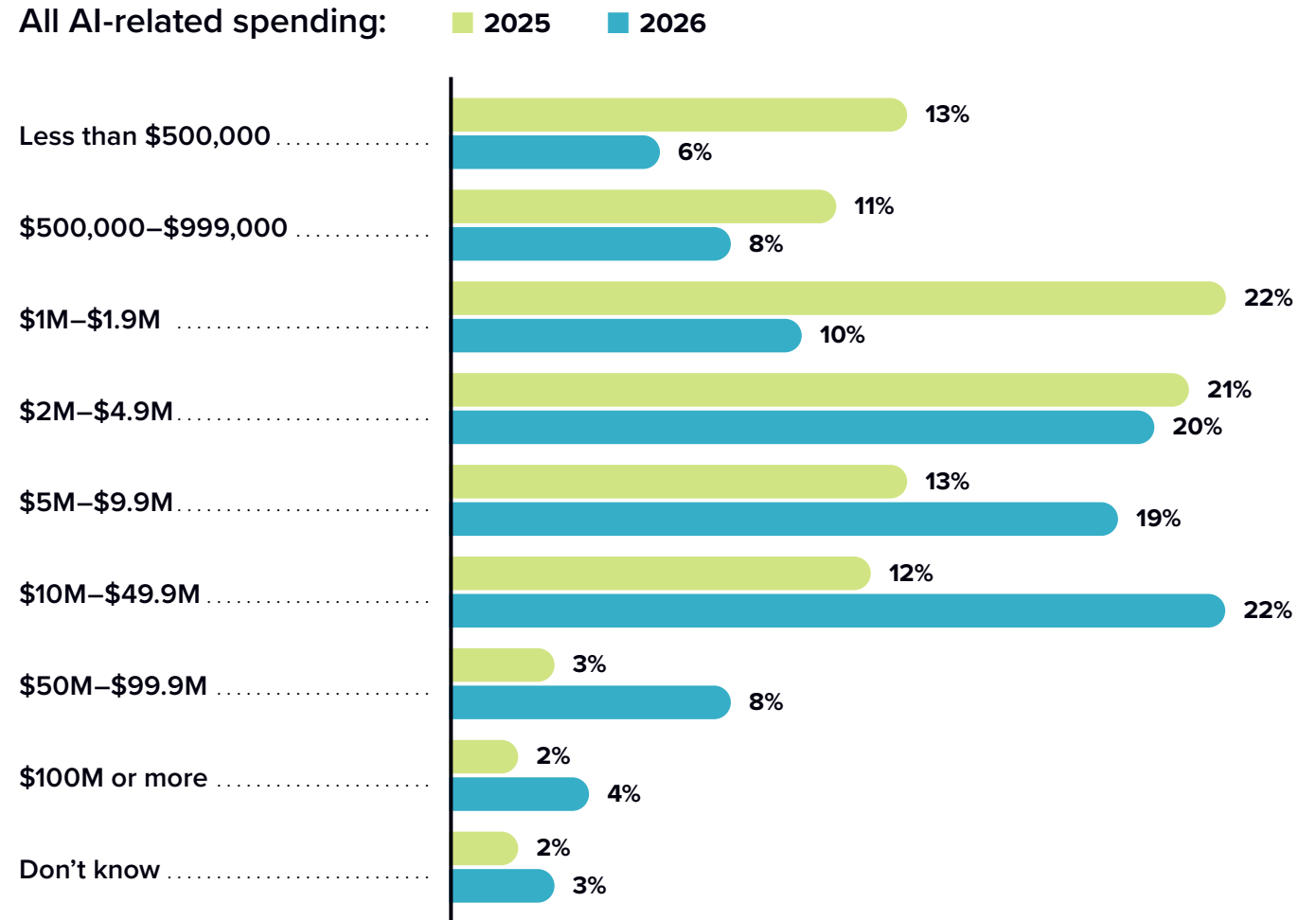
n = 885; Source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 1*, February 2025

AI-Related Spending Is Rising Quickly — Total Costs and Predictability Are Key

With organizations set to drastically increase AI spending in 2026, maximizing value and ROI while controlling unpredictable costs are key business outcomes.

The top 3 ways to deal with this are:

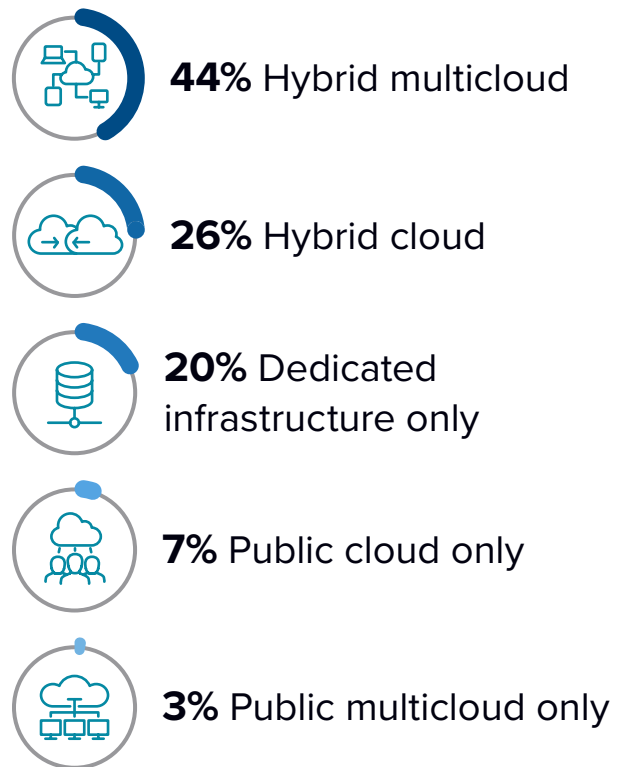
-  **46%** of respondents are seeking AI-driven pricing optimization tools
-  **46%** will prioritize flexible, usage-based pricing models to tie spend to COGS
-  **38%** will focus on locking in longer-term agreements to stabilize infrastructure costs



n = 1,007; Source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 4, 2025* | For an accessible version of the data on this page, see [Supplemental Data](#) in the Appendix.

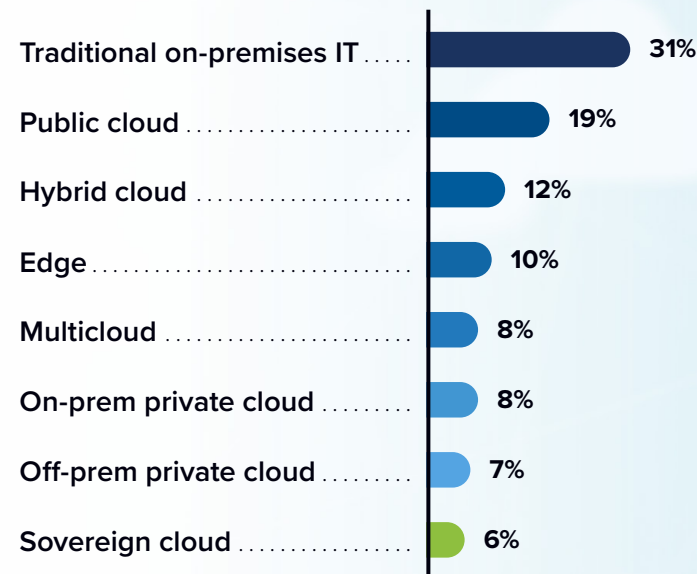
Hybrid Multicloud Is Preferred for Data Infrastructure, But It Does Not Align with Government Spending

Preferred Approach to Data Infrastructure:

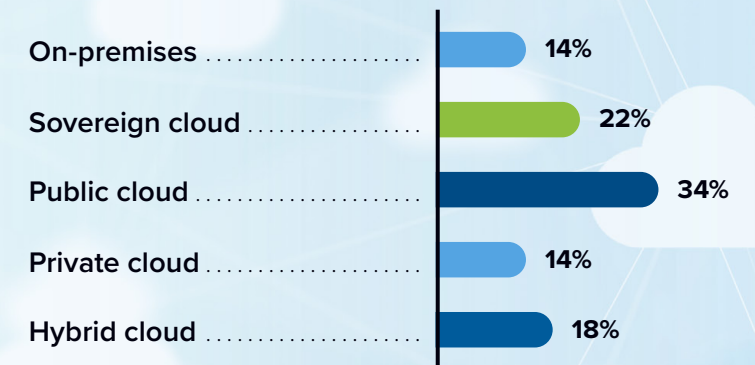


Which of the following is (or would be) your organization's preferred deployment model for AI?

Worldwide National Governments' Spending on IT Environments



Worldwide National Governments' Preferred Deployment Model for AI



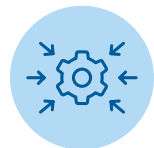
n = 373 (national government respondents); Source: IDC's *Enterprise Infrastructure Pulse Q2 2024*; IDC's *Government Industry Insights Survey*, March 2025

Diverse, Easy to Use, and Well Governed — a Shopping List for IT Leaders in AI Initiatives

Organizations seek to simplify AI deployments in a variety of ways:



Using the same infrastructure for a variety of diverse data-intensive workloads



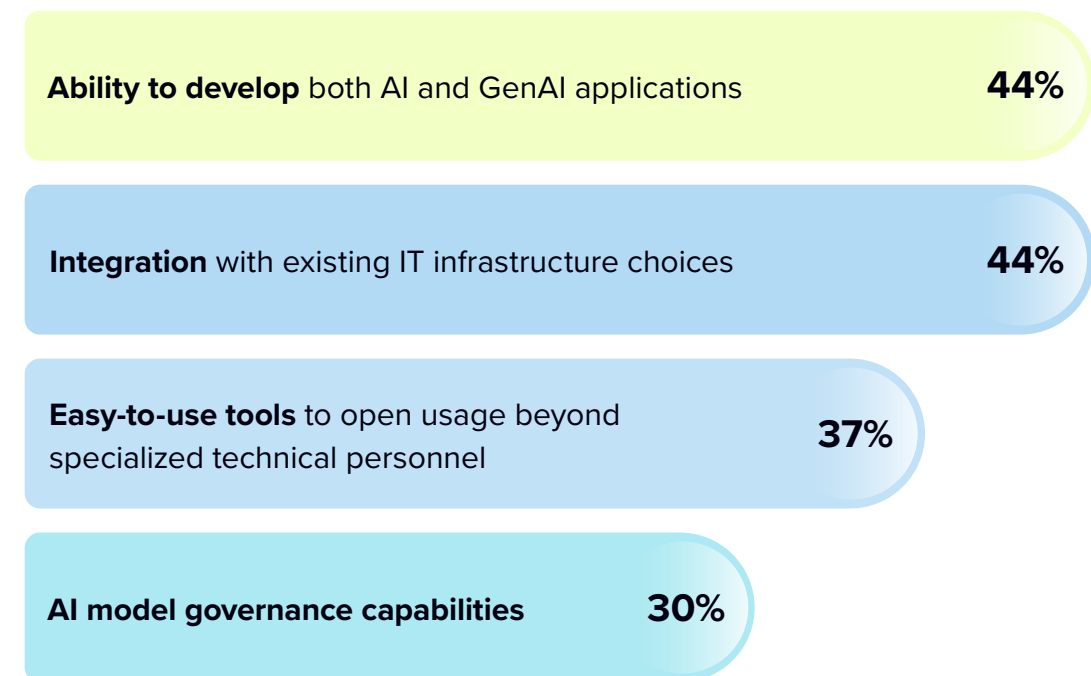
Having pre-integrated solutions that can work with existing infrastructure without requiring wholesale upgrades



Ensuring that the deployment, operation, administration, and use of these tools is as simple as possible for existing IT resources

n = 362; Source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 1*, February 2025

The most important factors used to evaluate AI platforms:

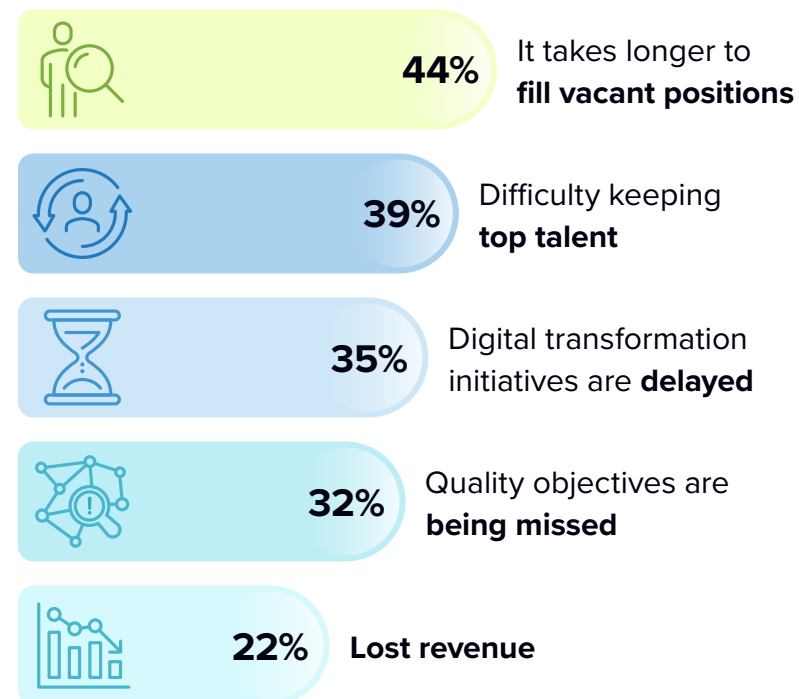


Complex “science project” implementations are untenable for organizations without the skills and time necessary to tinker on an ongoing basis or build their IT infrastructure from scratch.

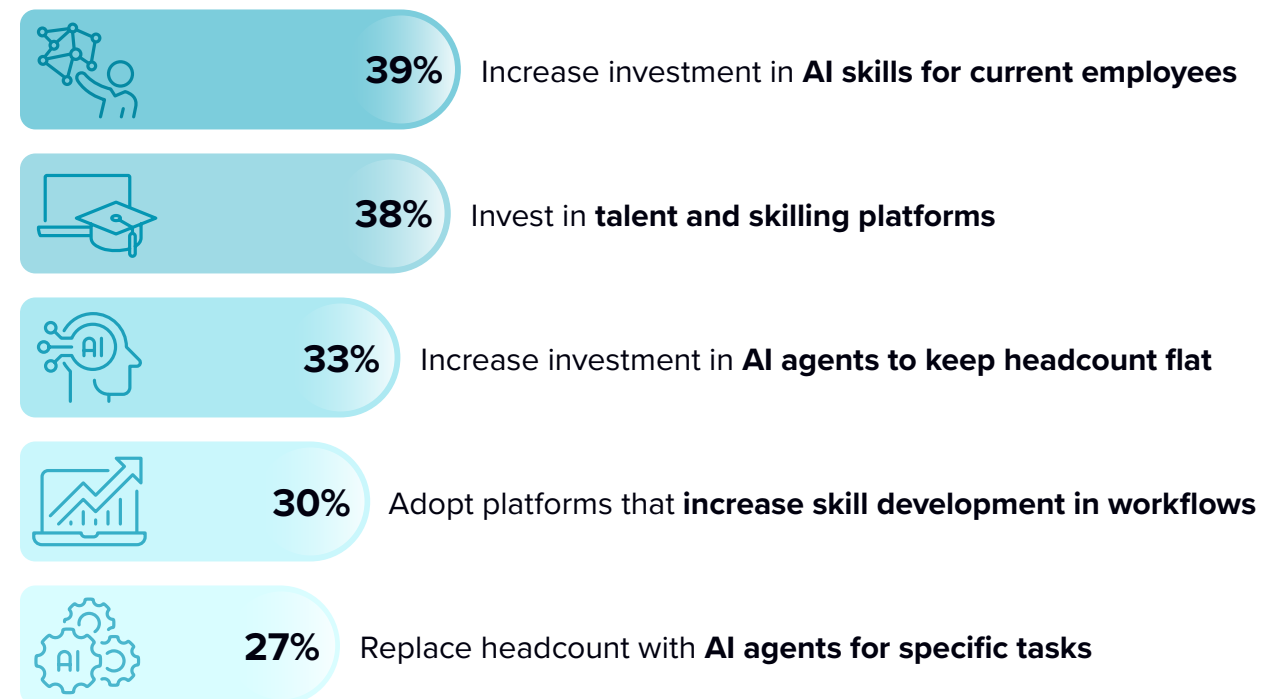
AI Can Be Both the Problem and the Solution When It Comes to Skills

Skills gaps are being exacerbated in the AI era, but investment in AI itself is how organizations hope to alleviate some of their pain points.

Companies report:



How organizations are investing in AI:



n = 426; Source: IDC's Future Enterprise Resiliency and Spending Survey, Wave 2, March 2025

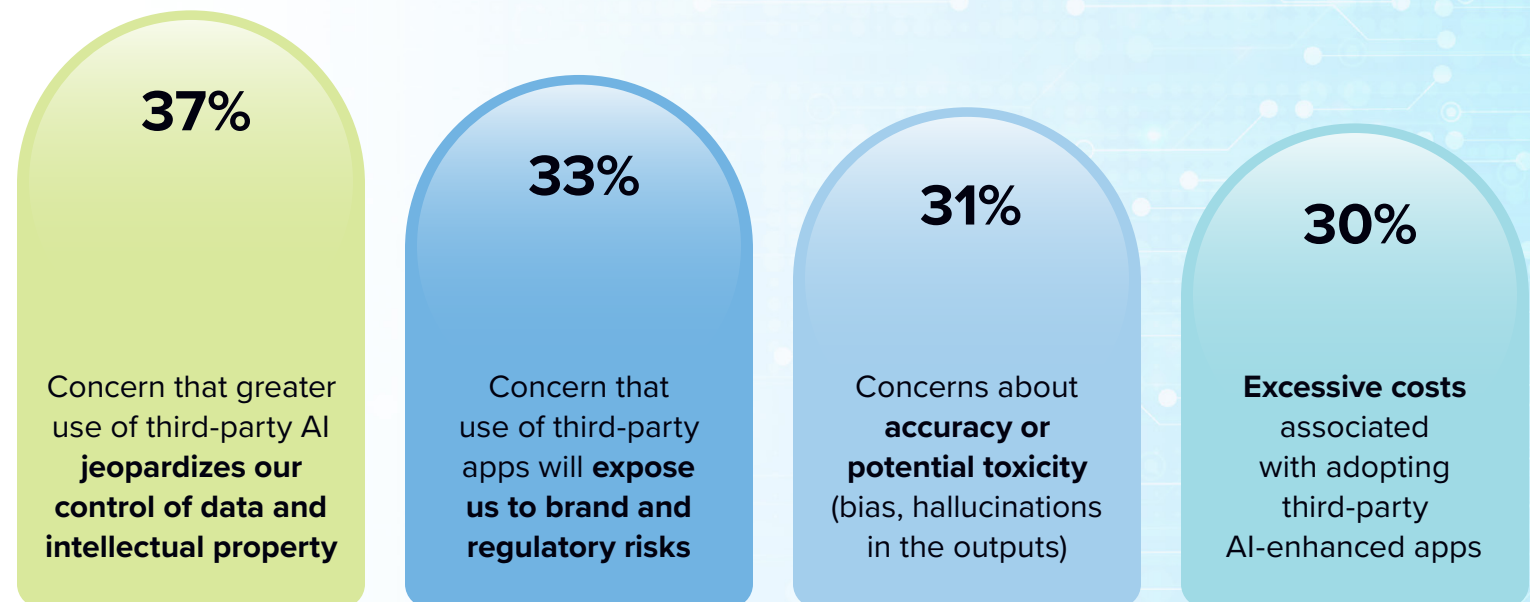
Sovereignty, Regulatory Compliance, and Accuracy in Third-Party AI

As AI workloads increasingly depend on large, diverse data sets, organizations must ensure that data is collected, stored, and processed in alignment with jurisdictional regulations, such as the GDPR, the CCPA, and emerging AI-specific governance frameworks.

Noncompliance exposes enterprises to financial penalties, threatens brand trust, and can delay the time to market for AI-driven solutions.

Data sovereignty mandates can influence where AI models are trained, which cloud regions are used, and how data pipelines are architected, driving demand for hybrid and multicloud strategies that enable localized processing with centralized governance.

Top factors hampering organizations' ability to move third-party apps/services from POC to production:



n = 891; Sources: IDC's Future Enterprise Resiliency and Spending Survey, Wave 7, July 2024; n = 885; Sources: IDC's Future Enterprise Resiliency and Spending Survey, Wave 1, February 2025

Selecting a Platform

Choosing the right platform for your AI initiatives may be the most important step in your AI transformation. Reducing cost, complexity, and time to value can increase your organization's achievement of business outcomes, leading to a distinct competitive advantage.



Strategy and Tactics

Strategic direction from the C-suite in creating a road map for a digital business needs to work in lockstep with IT decision-makers to ensure organizations address the key concerns this document describes.



Simplification

A turnkey solution can speed up deployment, reduce the infrastructure footprint, bridge the skills gap, ease management, and increase productivity while lowering costs, jump-starting day 2 AI operations.



Responsible AI

Ensure that your solution provides the tools you need to govern your data estate safely and responsibly. Get ahead of data sovereignty, privacy, and regulatory compliance issues with the right infrastructure selection.



Cost Versus Benefits

Not every enterprise is building the next global LLM. Choose the right-sized infrastructure for your AI or AI-infused apps. Balancing cost with capabilities and ensuring that your platform will give you the flexibility to move and grow with demand is a winning strategy.

Appendix: Supplemental Data

The table in this appendix provides an accessible version of the data for the complex figure in this document. Click “Return to original figure” below this table to get back to the original data figure.

SUPPLEMENTAL DATA FROM PAGE 7

All AI-Related Spending

	2025	2026
Less than \$500,000	13%	6%
\$500,000–\$999,000	11%	8%
\$1M–\$1.9M	22%	10%
\$2M–\$4.9M	21%	20%
\$5M–\$9.9M	13%	19%
\$10M–\$49.9M	12%	22%
\$50M–\$99.9M	3%	8%
\$100M or more	2%	4%
Don't know	2%	3%

n = 1,007; Source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 4, 2025*

[Return to original figure](#)

About the IDC Analyst



Dave Pearson

Research Vice President,
Storage and Converged Systems,
Worldwide Infrastructure Research, IDC

Dave Pearson is research vice president within IDC's Worldwide Infrastructure Research organization and global research lead for the Storage and Converged Systems practice. Pearson is also the research lead for IDC Canada's Infrastructure Solutions practice. He manages a team of analysts that cover both research domains. For the Storage and Converged Systems practice, Pearson and his team provide global insights on storage, integrated, hyperconverged and composable infrastructure technology trends, vendor strategies, and market adoption. It includes storage for performance-intensive computing use cases such as high-performance computing, artificial intelligence, and analytics. It also includes cloud-enabled infrastructure and infrastructure used for cloud deployments.

[More about Dave Pearson](#)

Message from the Sponsor



The partnership between Nutanix, Cisco, and Intel offers a full-stack AI-ready infrastructure solution that simplifies AI deployments and manages AI workloads with pre-validated designs and Intel AI accelerators that don't require additional licensing.

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IDC Research, Inc.
140 Kendrick Street, Building B, Needham, MA 02494, USA
T +1 508 872 8200

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