

Cloud Infrastructure Index

The *Cloud Infrastructure Index* provides insights into compute and storage infrastructure hardware procurement trends for leading named service providers (100 in 2024). This list includes hyperscalers (eight named companies that historically had the largest datacenter footprints: Alibaba, Alphabet, Amazon, Apple, Baidu, Meta, Microsoft, and Tencent), leading public cloud as-a-service providers (infrastructure, platform, and software), digital service providers (including web search, social media, ecommerce, and media streaming), hosters and managed service providers, communications service providers (telcos), and enterprises that operate like service providers. IDC has conducted this research since 2016 and before 2025 delivered it as a multiclient study under the moniker "CII 100" or "CII."

MARKETS AND SUBJECTS ANALYZED

- Historical compute and storage infrastructure procurement by an IDC-curated list of 100 noteworthy IT buyers, and total market sizing for the buyer type segments in the study
- Compute (server) and storage (external, internal) spending
- Compute (server units) and storage (flash and HDD capacity)
- Other segmentations available upon request (for an additional fee), such as CPU types, workload accelerators like GPUs, and function accelerators like DPUs

Note: Data delivered as part of this *Cloud Infrastructure Index* will be based on procurement models for each of the tracked companies. This is built based on IDC's understanding and ongoing relationships with the OEM and ODM-direct suppliers, research on infrastructure component procurement, and research on public cloud infrastructure builders. The result will be validated and cross-checked against other IDC data products (including but not limited to IDC Trackers).

CORE RESEARCH

- Table of 100 named firms and their compute and storage infrastructure procurement, respectively (2016 onwards, spending and volume/capacity) (Microsoft Excel format)
- Table of top 20 service providers and their compute and storage infrastructure procurement (Microsoft Excel format)
- Summary of findings, including buyer type segment forecast (Microsoft PowerPoint format)

Note: Limited data posted on [idc.com](https://www.idc.com). Full data sets delivered to subscribers directly, based on the level of detail purchased. Subscribers also get unlimited access to analysts for inquiries (provided the inquiry falls within the purview of the data being delivered). Additional deliverables and custom segmentation are available upon request and may require additional fees.

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: [Cloud Infrastructure Index](#).

KEY QUESTIONS ANSWERED

1. Besides the top service providers (aka hyperscalers) like Amazon, Google, Microsoft, and so forth who are the top named buyers of compute and storage infrastructure?
2. How much compute and storage infrastructure do they purchase? How is it allocated between compute and storage infrastructure? Within storage, what is the allocation between external and internal, flash, and HDD?
3. What are the drivers of infrastructure procurement and deployment decisions made by these firms?
4. Who are the top suppliers to these organizations? What are the design criteria (e.g., how do workloads like AI drive these design decisions)?

COMPANIES ANALYZED

This service reviews the strategies, market positioning, and future direction of several providers in the *Cloud Infrastructure Index* market, including:

Adobe, ADP, Akamai, Alibaba, Alphabet, Amazon, America Movil, Apple, AT&T, athenahealth, Baidu, Bank of America, Bell Canada, Blackbaud, British Telecom, ByteDance, Capital One, Carbonite, CenturyLink, Charter Communications, China Mobile, China Telecom, China Unicom, Cisco, Citigroup, Cloudflare, Comcast, CoreWeave, Cox Communications, Dailymotion, Deutsche Telekom, Digital Ocean, Dimension Data, Dropbox, eBay, Endurance International, Fastly, Fiserv, Flexential, Fujitsu, GoDaddy, Goldman Sachs, Hetzner, Huawei, IBM, Infor, Intuit,

JD.com, JPMorganChase, KDDI, Kingsoft, Kuaishou, Liberty Global, Limelight, LinkedIn, Linode (Akamai), Meta, Microsoft, Netflix, NTT, OpenText, Oracle, Orange, OVH, Packet, Pandora, Paperspace, PayPal, Rackspace, Sakura Internet, Salesforce.com, SAP, ServiceNow, SoftBank, SPS Commerce, Swisscom, Symantec, Target, TD Bank, Telecom Italia, Telefonica, Telstra, Tencent, Tesla, TikTok/Toutiao, Twitter, Uber, UCloud, Ultimate Software, United Internet, Verizon, Vimeo, Vodafone, Walmart, Wasabi, Wayfair, Weibo, Workday, Yahoo, Yahoo JP, and Yandex.