The cloud market in Europe: strategic trends in 2025 according to Aruba

By Massimo Bandinelli, Marketing Manager, Aruba Cloud

The cloud market in Europe is experiencing an unprecedented evolution, driven by strategic transformation aimed at consolidating digital sovereignty, embracing sustainable models, and catalysing technological innovation. According to IDC data, 60 percent of European companies are allocating their IT budgets to the public cloud, with an additional 24 percent adopting a hybrid cloud approach. These trends respond to immediate market pressures and also outline a new strategic direction for the entire digital ecosystem, charting investment guidelines and industry business choices for the coming years.

Below are the main factors that will drive the cloud market in 2025, according to Aruba.

Sovereign Cloud and Data Sovereignty

Data management is now a key issue for European businesses and governments, with an increasing focus on protection and digital sovereignty. The need to keep data within national and European Union borders has become a strategic priority, directed by the need to protect privacy and ensure full compliance with local and European regulations. This phenomenon has given rise to a growing demand for "sovereign cloud" solutions, prompting providers to innovate their infrastructures to meet data location and control criteria that, for businesses, are no longer optional, but crucial to competitiveness and customer trust.

Freedom of Technological Choice

Another key trend that will drive the European cloud market in 2025 is the increasing desire to avoid vendor lock-in. Having the ability to switch between cloud providers allows companies to be flexible and have the freedom to use the technologies they prefer without depending on legacy and prior choices. This approach not only reduces the risk of dependence on proprietary platforms, but also facilitates migration to diversified cloud solutions in response to evolving business needs.

Increasingly Open Source

Awareness will continue to grow around the benefits of an increasingly open source oriented model, which will become a key component of companies' digital transformation. Open source solutions in the cloud offer greater flexibility, transparency and agility, allowing organisations to customise their IT infrastructures according to specific business needs, without being constrained by proprietary platforms. This approach fosters interoperability between different systems, accelerating the adoption of innovative technologies and reducing operational costs.

The Importance of Sustainability

Sustainability is now an imperative for 79% of European companies when it comes to IT infrastructure decisions. The global urgency to reduce carbon emissions and promote responsible environmental practices has transformed sustainability from a value-add to a necessity. Organisations are turning to cloud providers that not only possess green infrastructure, but are, for example, committed to clean energy production through renewable sources, thus meeting a growing demand for more sustainable technology solutions over time. In a context where the market is increasingly aware of the importance of environmental responsibility, the cloud industry is also being called upon to fully integrate itself into this transformation process.

Security and Operational Resilience

As cyber threats intensify globally, companies are increasingly turning to cloud solutions that offer high standards of security and ensure continuous operational resilience. In particular, companies operating in highly regulated

industries face complex challenges related to data protection and resilience in critical situations. In this context, the European regulatory framework, for example with the NIS2 directive and the DORA regulation, requires companies to strengthen their defences and implement resilience mechanisms. The growing demand for secure and monitored cloud infrastructures, equipped with disaster recovery protocols and solutions, underscores the importance of proactive security management. Cloud resilience is no longer just a competitive advantage, but an essential element in protecting corporate data and ensuring business continuity, regardless of circumstances.

Artificial Intelligence as an Engine of Innovation

Artificial intelligence and generative AI solutions have become strategic pillars for business growth and innovation. With 87 percent of European enterprises already actively involved or planning to adopt cloud-based AI, there is an increasing demand for infrastructure capable of supporting advanced analytics and machine learning. In this context, the scalability and flexibility offered by cloud solutions are crucial to meet the growing needs for computational power and storage, enabling companies to embrace innovation at scale and take full advantage of the potential of emerging technologies. In this regard, advanced cooling solutions, such as liquid cooling, play a major role, which are essential when increased computational power leads to a significant increase in heat generation.

Toward Greater Cloud Maturity

Although many European companies are still in the early stages of transitioning to the cloud, the market is rapidly evolving toward greater maturity in digital strategies. Over the next few years, enterprises are expected to enhance their internal competencies and implement best practices to optimise the benefits of the cloud, arriving at a fully integrated and efficient digital asset management model. This process will solidify the role of the cloud as a key driver of for business agility and efficiency, but will also contribute to the creation of a more advanced and strategic digital ecosystem for long-term success.

The Role of Aruba Cloud

In this rapidly evolving scenario, Aruba is proud to have been recognised as a 'Major Player' in the annual IDC MarketScape 2024, consolidating its leadership in the Italian cloud landscape. As highlighted by IDC, Aruba's distinctive strategy, based on open source and interoperable cloud technologies, provides customers with a lock-in-free approach while preserving full control of their data.

"*Aruba Cloud,*" the IDC report goes on to say, "*places a strong emphasis on data sovereignty and security, making it an ideal choice for companies with stringent compliance requirements and the public sector. In addition, the provider is committed to high-quality data centre operations and excellent service to its customers, ensuring consistent performance and reliable services.*"

For further info: https://www.arubacloud.com/aruba-cloud-idc-report-2024.aspx

Aruba S.p.A.

Aruba S.p.A. (http://www.aruba.it), founded in 1994, is Italy's leading provider of cloud, data centre, hosting, e-mail, domain registration and PEC (certified email) services. The company, with wholly Italian capital, has 16 million users and manages a vast infrastructure distributed on 7 data centres that includes 2.7 million registered domains, 9.8 million e-mail accounts, 9 million PEC accounts and thousands of customer IT infrastructures. Aruba PEC and Actalis are the group's two Certification Authorities, accredited with AgID (Agenzia per l'Italia Digitale) for the provision of qualified services. Aruba's infrastructure is also qualified by ACN (National Cybersecurity Authority) to handle ordinary, critical and also strategic PA data. In 30 years of activity, Aruba has developed extensive experience in the design and management of high-tech data centres, owned and distributed throughout Italy. The largest is located in Ponte San Pietro (BG) and features green-by-design infrastructure and facilities that comply with the highest security standards in the industry (Rating 4 ANSI/TIA-942, ISO 22237), to which is added the Hyper Cloud Data Centre in Rome, which covers 74,000 m² in the area of the Tecnopolo Tiburtino and at full capacity will include 5 independent

data centres. Aruba implements energy-efficient solutions in its data centres, demonstrating its commitment to sustainability and, in addition, produces clean energy through photovoltaic plants and hydroelectric power plants. The infrastructure network also extends across Europe, with a proprietary data centre in the Czech Republic and partner facilities located in France, Germany, Poland, and the United Kingdom.

For further information, please visit https://www.aruba.it/ and social networks Facebook, X and LinkedIn

Media Contacts:

Megan Cowlbeck/Lorna Miller

aruba@rlyl.com

Red Lorry Yellow Lorry for Aruba