



Accelerating the Enterprise AI Journey with Cross-Cloud Network



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IDC's Point of View

Multicloud networking, which includes hybrid cloud, integrating connectivity, security, application and content delivery, and programmability, is a solid secular growth trend in IDC's view.

IDC believes that 2024 is an inflection point for the global-scale enterprise adoption of multicloud networking platforms and services across industry verticals and use cases.

This IDC white paper highlights major industry trends, IT challenges, and business objectives that organizations should be aware of as they seek to define, plan, build, and operate “multicloud networks.” This is for accelerating their digital transformation journeys and generating sustainable return on their IT investments.

Key Industry Trends

A key trend worth highlighting is the ability of modern multicloud networking platforms, such as Google Cloud's Cross-Cloud Network, to offer organizations a simplified solution that eliminates complex bespoke networks while providing higher performance, lower latency, and embedded security across clouds and on-premises facilities. With modern network and service-layer connectivity, Cross-Cloud Network enables IT and developers to optimize workload deployment and accelerate application development.

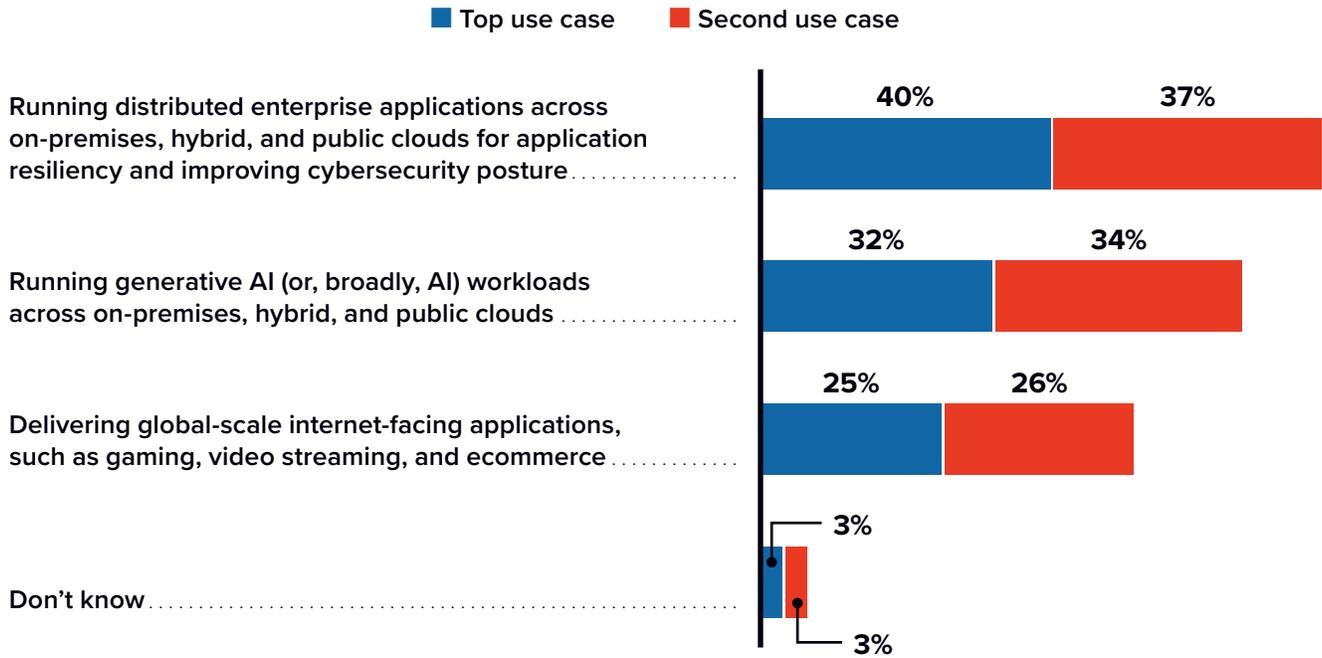
Another trend in multicloud networking platforms is the integration of cloud-native, load-balancing, application delivery, and AI-/ML-powered network security (next-generation firewall [NGFW], web application firewall [WAF], etc.) capabilities into commercially available CI/CD DevOps automation platforms, such as Jenkins, GitLab, and Cloud Build.

IDC's December 2023 *Future Enterprise Resiliency and Spending (FERS) Survey, Wave 11*, has meaningful takeaways for the multicloud networking ecosystem (see **Figure 1**, next page).

FIGURE 1A

Is Multicloud Networking Starting to Inflect?

What are the enterprise buyers' top multicloud networking use cases?
(Percentage of respondents)

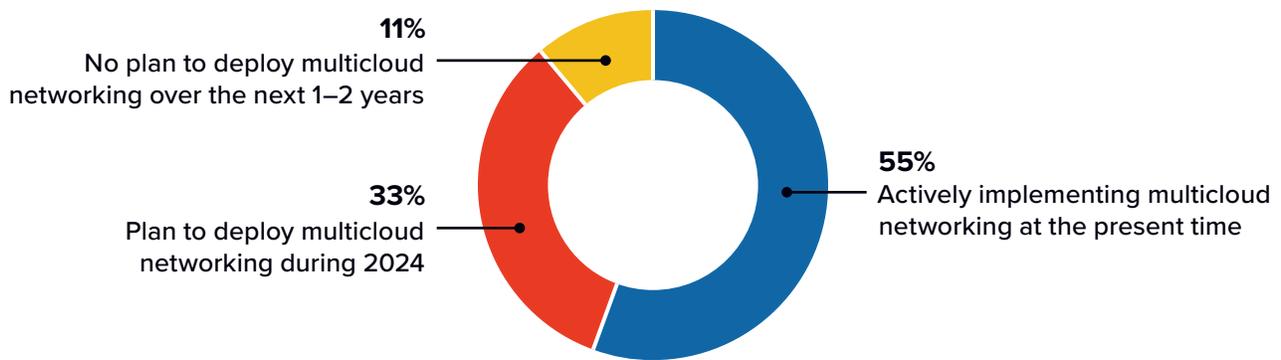


For an accessible version of the data in this figure, see [Figure 1A Supplemental Data](#) in the Appendix.

FIGURE 1B

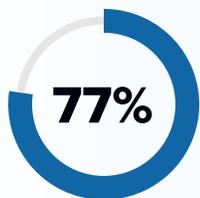
Is Multicloud Networking Starting to Inflect?

What are the enterprise buyers' multicloud networking deployment timelines?
(Percentage of respondents)



Note: For more information, see *Multicloud Networking Starting to Inflect — Top Use Cases Include Application and Business Resiliency, Improved Cybersecurity Posture, and Global-Scale Delivery of Internet-Facing Applications* (IDC #US51795623, January 2024). Total may not sum to 100%. n = 881; Source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 11*, December 2023

Key takeaways from IDC's *FERS Wave 11* survey results:



of enterprise buyers surveyed (n = 881) highlight **“application and business resiliency”** and **“improved cybersecurity posture”** as among the top business outcomes for scaling out their enterprise workloads (e.g., containerized microservices applications) across on-premises, hybrid, and public cloud runtimes using multicloud networking services.



point to **“generative AI (GenAI)”** and, broadly, **“AI/ML workloads”** as their top use cases for utilizing multicloud networking capabilities. **More than half (55%)** note the global-scale delivery of internet-facing applications (e.g., gaming, video streaming, and short videos) as one of their top multicloud networking use cases.



of enterprise buyers are **“actively implementing multicloud networking to accelerate their application modernization and digital transformation journeys.”** The 55% data point is a core anchor for IDC’s view on multicloud networking starting to inflect this year. Multicloud networking is crucial for accelerating and actioning enterprise’s digital transformation journeys.

Underpinning the growing enterprise adoption of multicloud networking platforms and services are robust longer-term demand drivers, which are discussed in the sections that follow.

Growing Enterprise Adoption of SaaS Applications

IDC’s 2023 *SaaSPath Survey* highlights that enterprises globally are increasing SaaS investments across 23 software markets; 31% are planning on replacing their current systems within 12 months, 11% in 12–24 months, and 5% in 24–36 months.

Further, our primary research suggests a growing trend among midmarket and large enterprises to consume SaaS applications — at a services layer and via seamless “any-to-any” connectivity — across cloud platforms.

Services-layer connectivity, such as Google Cloud’s Private Service Connect (PSC), works across clouds and on-premises customer virtual private clouds (VPCs) to internet SaaS providers — simplifying IT management and threat exposure across clouds and eliminating the need to configure VPC peering, NAT, and internet gateways.

Said another way, PSC enables secure, line-rate, low-latency, and “services oriented” connectivity between application consumers and producers. PSC implements fine-grained control and visibility over the end-to-end service networking architecture.

In IDC’s view, a multicloud networking, security, and load-balancing platform is likely to be increasingly adopted by enterprise IT as a “need to have” versus a convenience. This is for providing a consistent platform for high-speed connectivity for enterprise users to consume cloud provider–hosted and third-party SaaS offerings securely across their user environments.

Generative AI Enabled by Cross-Cloud Networking and Security

GenAI is a “workflow” involving data preparation, model training, inferencing, serving, and integrating the inferencing results in B2B, B2C, and ITOps apps. The GenAI workflow — for economic, data, and model locality reasons — runs on multiple public, hybrid, and edge cloud platforms. This is a key driver, in IDC’s view, for utilizing global-scale multicloud networking, security, and application delivery — for actioning the enterprise GenAI workflow.

Multicloud networking makes a global-scale cloud infrastructure possible for implementing distributed AI/ML inferencing, along with the related data sets, across cloud platforms. Security controls — at the network and application layers — are critical for ensuring high levels of trust and quality of experience for AI/ML inferencing. This is particularly relevant for GenAI B2C and B2B applications, which are simultaneously accessed by tens of thousands to millions of end users across geographies (see **Figure 2**, next page).

FIGURE 2A

Multicloud Networking Importance to GenAI

How important to your generative AI strategy is the ability to utilize multicloud or hybrid cloud architectures?
(Percentage of respondents)

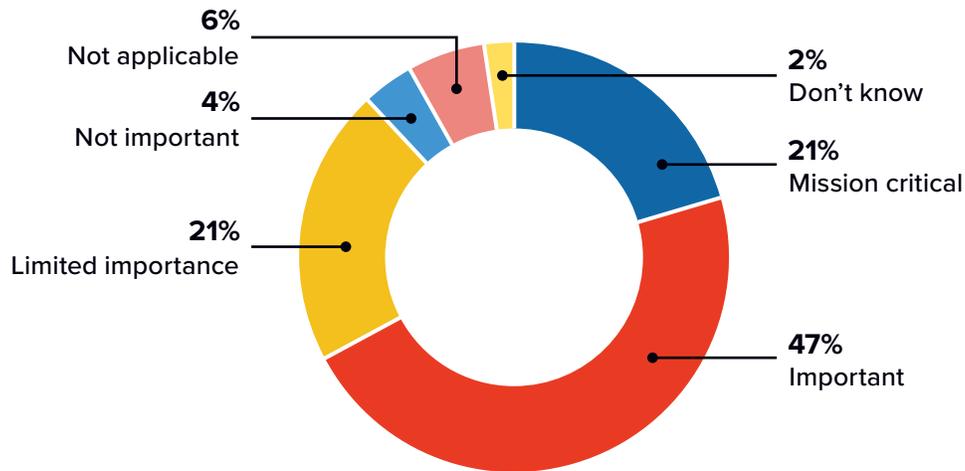
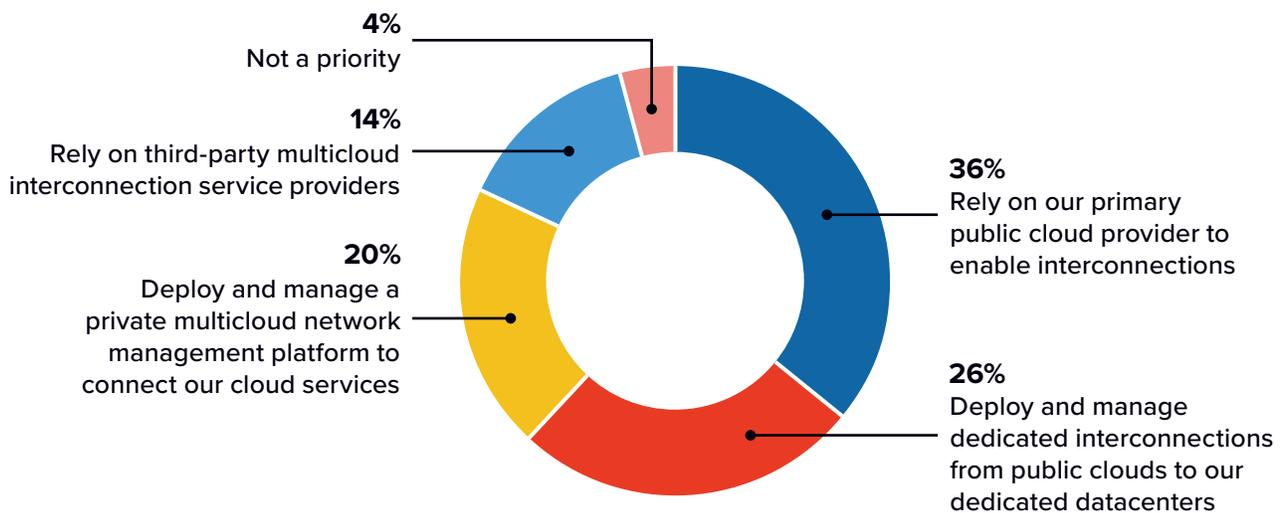


FIGURE 2B

Multicloud Networking Importance to GenAI

What is your preferred approach for enabling multicloud and datacenter network interconnections for generative AI?
(Percentage of respondents)



Note: For more information, see *Hyperscale Cloud Platforms and Services and Multicloud Networking Rank High Among Preferred IT Capabilities for Actioning Enterprise Buyers' Generative AI Strategies* (IDC #US51290523, October 2023). Total may not sum to 100%.
Source: IDC's *Future Enterprise Resiliency and Spending Survey, Waves 6 and 7, July and August 2023*

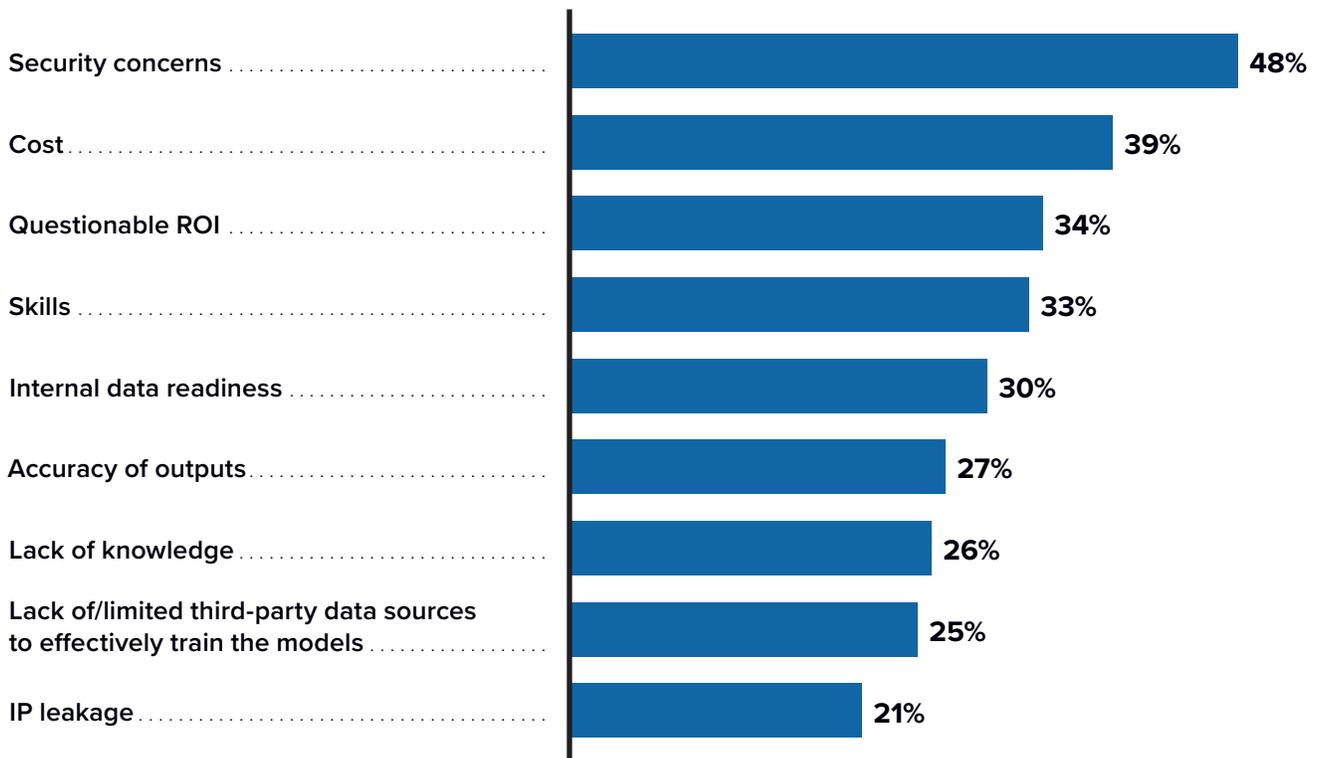
IDC’s August 2023 *C-Suite Tech Survey* (n = 895) noted security concerns as the number 1 challenge associated with implementing enterprise GenAI initiatives (see **Figure 3**). A key takeaway from the *C-Suite Survey* is the C-suite viewpoint that “trust” needs to be at the center of GenAI strategy, technology planning, and execution.

FIGURE 3

Top GenAI Challenges

What are the most important challenges your organization is facing (or anticipates it will be facing) with implementing GenAI initiatives?

(Percentage of respondents)



Note: For more information, see *C-Suite Top Priority Investments and Challenges: Generative AI Meets the Security Challenge* (IDC #US51291723, October 2023). n = 895; Source: IDC’s *Worldwide C-Suite Tech Survey*, August 2023

Bigger picture, IDC anticipates GenAI and, broadly, AI/ML workloads to be a multiyear growth driver for hyperscale cloud platforms that offer high-speed multicloud networking, security, and application delivery capabilities worldwide using as-a-service consumption models.

Global-Scale Delivery of Internet-Facing Applications

Quality of digital experience and global reach is business critical for low-latency internet-facing applications, such as multiplayer gaming, ecommerce websites and apps, and live streamed or on-demand video.

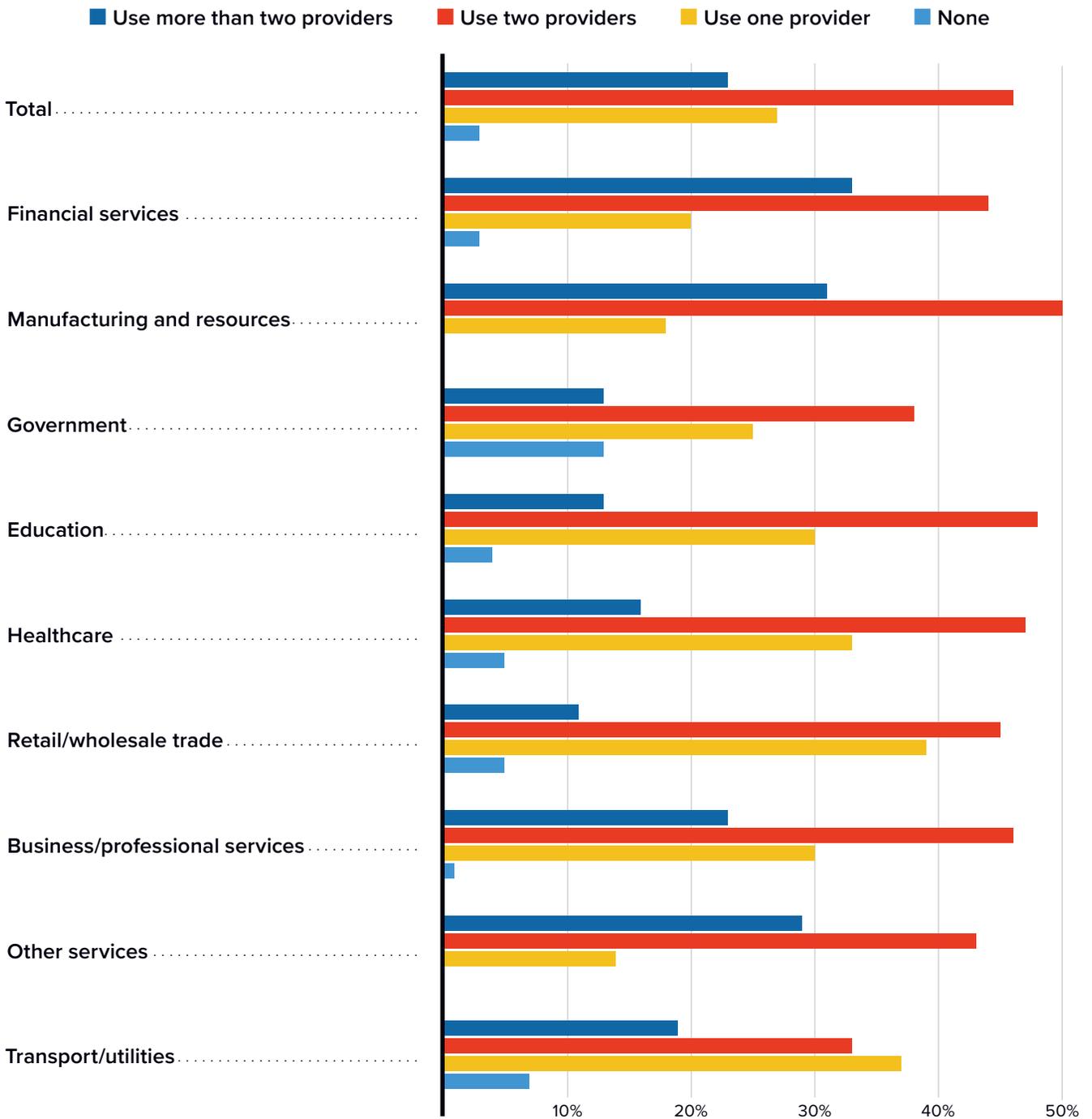
Enabling superior digital media experiences requires multicloud networking platforms with service extensions such as edge content delivery network (CDN) capabilities that offer application owners easy-to-use customized capabilities such as event activity monitoring, traffic steering, edge authentication, and log analytics. Service extensions for cloud-native load balancers also enable simplified integration to specialized third-party applications for bot management, API security, and so forth.

A supportive data point for enterprises' need to scale digital experiences using multicloud networking platforms is IDC's August 2022 *Enterprise Communications Survey* (n = 600) highlighting that 46% of U.S. businesses use two CDN providers (see **Figure 4**, next page). Security (67% of respondents), high performance (59%), and network capacity and scalability (57%) were noted as the top three priorities for organizations looking to deliver internet-facing content and applications (see **Figure 5**, page 12).



FIGURE 4
Content Delivery Network Providers

Do you currently use one or more content delivery network providers?
 (Percentage of respondents)



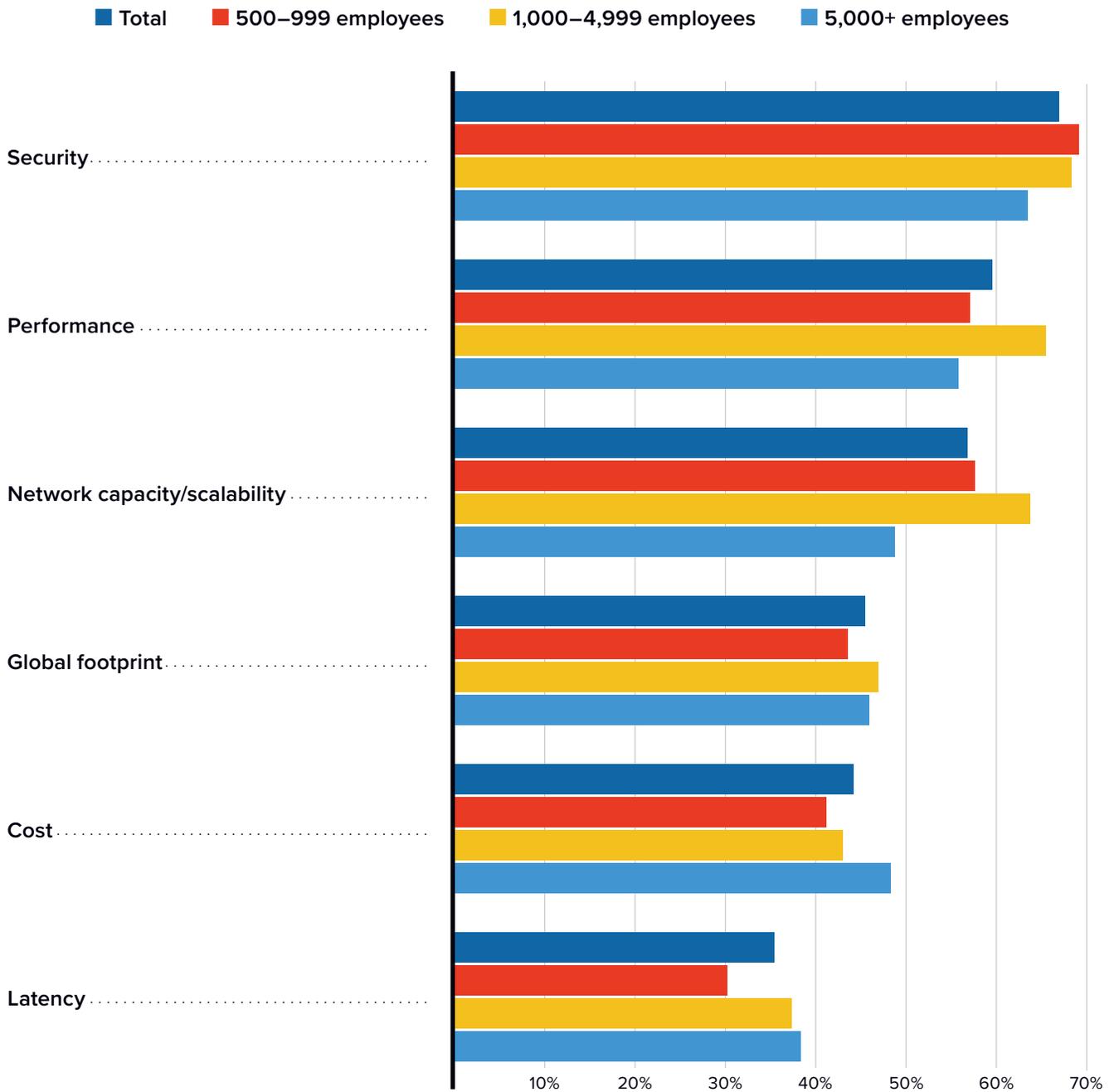
n = 600; Source: IDC's U.S. Enterprise Communications Survey, August 2022
 For an accessible version of the data in this figure, see [Figure 4 Supplemental Data](#) in the Appendix.

FIGURE 5

Top CDN Provider Considerations

What key considerations are important in selecting a CDN provider?

(Percentage of respondents)



n = 600; Source: IDC's U.S. Enterprise Communications Survey, August 2022

For an accessible version of the data in this figure, see [Figure 5 Supplemental Data](#) in the Appendix.

Heading into 2024, IDC sees globally relevant internet-facing applications placing heightened demand on hyperscale cloud and edge infrastructure platforms. Our primary research indicates that edge programmability, security, networking, and open APIs are trending as top of mind for IT practitioners and application owners across the content creation and delivery ecosystem.

Securing and Integrating Hybrid Workforce in the Cloud

Hybrid workforce has become the new normal as organizations, big and small, are fast adapting to a post-pandemic world. Many branch and remote users connect with software-defined wide area network (SD-WAN) and security service edge (SSE) stacks to access on-prem and cloud services today. This is for accessing business-critical applications and services and driving the convergence of on-premises systems with cloud environments.

The software-defined wide area network industry ecosystem is evolving rapidly as organizations offer hybrid work options to their employees. Major areas of growth include security, access to cloud resources, multicloud connectivity, analytics, and performance metrics across user and application experience.

IDC highlights that a SD-WAN infrastructure enables enterprises to cost-efficiently enhance their branch and remote user connectivity by providing cost savings versus legacy WAN architectures and infrastructure. Put simply, SD-WAN enables organizations to significantly optimize their WAN connectivity and ensure on-demand access to major cloud platforms while enforcing robust company-specific security and business policies.



Key Trends in the SD-WAN Space

Key trends in the SD-WAN space include:

- ▶ Security playing a bigger role in SD-WAN offerings
- ▶ Integration of software-defined cloud interconnection capabilities
- ▶ Packaging of SD-WAN solutions that continues to evolve

Source: Worldwide SD-WAN Infrastructure Market Shares, 1H23: Growth Momentum Continues Driven by Cloud, Security, and Automation (IDC #US51386423, November 2023)

The SD-WAN market has focused on the ongoing integration of security features with SD-WAN infrastructure management platforms. Many SD-WAN vendors are taking a multipronged approach to support security in their SD-WAN offerings. This includes integrating SD-WAN with enterprise IT security platforms such as next-generation firewalls (NGFWs), intrusion prevention and detection systems, and URL and content filtering.

IDC believes that SD-WAN vendors should provide customers a choice to manage security on premises or from the cloud and offer integrations with a broad range of security solutions.

Google Cloud Cross-Cloud Network

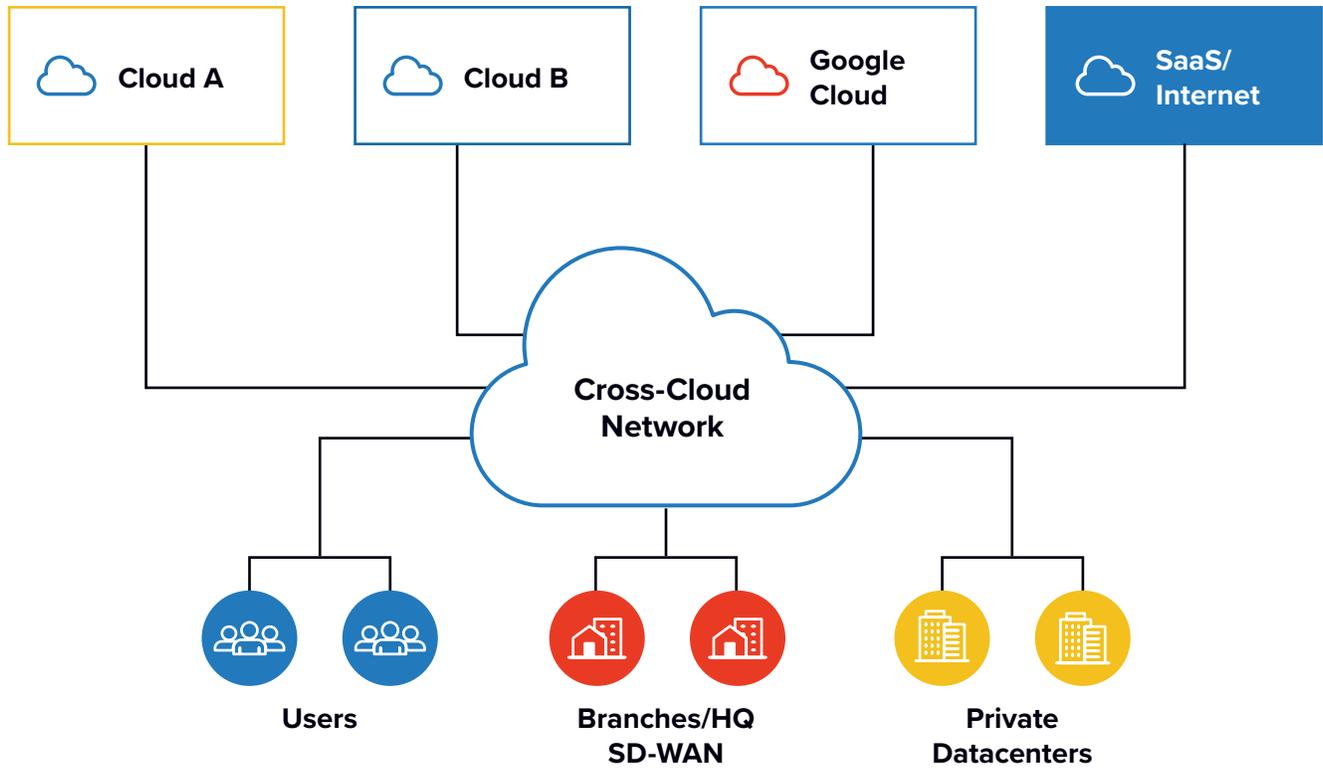
The major industry and technology trends discussed in this white paper are rapidly evolving to serve the needs of organizations in a fast-paced global economy.

Organizations are leveraging cloud to modernize their infrastructure to increase business agility and secure their assets. Currently, a majority of enterprises operate in hybrid and multicloud environments. Streamlining the network has become more important than ever as applications and data become distributed, cybersecurity threats such as bot attacks skyrocket, hybrid workforce becomes table stakes, and AI/ML leads to a new inflection point in business efficiency.

Google Cloud's Cross-Cloud Network, in IDC's view, addresses many of the foundational networking and security challenges for enabling a new business paradigm. Specifically, Cross-Cloud Network provides a fabric to interconnect the different networks in a global hybrid and multicloud environment and optimally deploy security services. By centralizing these services through Cross-Cloud Network, organizations can simplify the connectivity and security challenges of supporting multicloud and distributed applications while optimizing the connectivity paths and performance that the applications require.

Cross-Cloud Network is built upon Google's global-scale fiber optic network and provides a full stack of intelligent network services that optimize performance, efficiency, and operational cost for a broad swath of organizations across industry verticals, company size, and scale of operations (see **Figure 6**, next page).

FIGURE 6
Google Cloud Cross-Cloud Network



Source: Google, 2024

Cross-Cloud Network Use Cases

Google Cloud's Cross-Cloud Network enables an evolving suite of use cases and provides a secure, resilient, and high-performance solution for any company looking to deploy hybrid or multicloud resources. We highlight three initial uses cases, discussed below:

- ▶ Distributed applications and AI/ML workloads
- ▶ Internet-facing applications and content
- ▶ Secure hybrid workforce

Distributed Applications and AI/ML Workloads

A distributed application is an application stack that combines services from multiple clouds and/or private datacenters. Traditional multicloud networks are built to enable the consumption of different application stacks hosted in different clouds, with all layers of an application stack hosted by a single cloud provider or in a single datacenter. Multicloud connectivity can then be used for one cloud to back up another or to transfer data to enable application migrations. Application stacks are fully encapsulated within a single cloud.

Cross-cloud networking introduces the concept of leveraging services from multiple clouds and building an application stack that may have different layers hosted by different cloud providers. Google Cloud's Cross-Cloud Network effectively provides the experience of a single cloud across multiple clouds and simplifies the network to help enterprises accelerate agility.

Cross-Cloud Network supports traditional networking models and service-centric architectures, which makes it easier to connect and secure applications across clouds while reducing the total cost of ownership (TCO) by up to 40%. With service-centric Cross-Cloud Network, enterprises can set up Google Cloud or partner-managed services across hybrid and multicloud environments with Private Service Connect. Google Cloud services include Cloud SQL, Looker, Spanner, and Vertex AI, and partner-managed services include MongoDB, Databricks, Datastax, and Redis. Private Service Connect empowers developers and data scientists to connect their applications securely within minutes, bridging the gap between DevOps, NetOps and SecOps.

For connectivity across cloud providers, Google Cloud offers products such as Cross-Cloud Interconnect, offering a managed interconnect with 10Gbps or 100Gbps bandwidth backed with a 99.99% SLA. It supports a direct connection to major cloud providers such as Alibaba Cloud, AWS, Microsoft Azure, and Oracle Cloud Infrastructure with availability in all Google Cloud regions to enable customers to drive faster business outcomes.

Google Cloud offers a comprehensive security portfolio to secure workloads and data by combining in-house and partner solutions. Cloud NGFW, developed with Palo Alto Networks, is a cloud-native firewall that provides high-efficacy threat protection. Google has developed a network data loss prevention platform with Broadcom that can be leveraged natively on Google Cloud.

Google Cloud provides design guides in the Cloud Architecture Center that illustrate how organizations can deploy distributed applications with global and regional constructs, services, and networking paradigms. The design guides help ensure optimized application performance, security, and resiliency.

Internet-Facing Applications and Content Delivery

Quality of experience is key for internet-facing applications, such as gaming, shopping, shorts, live streaming, and super apps. Google Cloud's global front end provides the foundation to help organizations deliver, scale, and protect their internet-facing applications using Google Cloud's global infrastructure with Cloud Load Balancing, Cloud Armor, and Cloud CDN. Available in all Google Cloud regions, they work together to provide a unified front end to protect and deliver optimal performance and user experience. Leveraging Cross-Cloud Interconnect to bring other clouds together, Cross-Cloud Network delivers the performance, reliability, and global reach needed with 40% lower TCO, as per Google Cloud's data.

There are several advantages to using a global front end. These include:

- ▶ **Reliability:** Improving application availability and performance with Google Cloud Load Balancing
- ▶ **Performance:** Delivering low-latency performance with CDN, which significantly improves user experience
- ▶ **Security:** Protecting applications and content with ML-powered WAF via Cloud Armor, which has prevented some of the largest DDoS attacks on the planet
- ▶ **Programmable:** Offering customer programmability and extensibility during data processing with Service Extensions for Cloud Load Balancing and Media CDN (this is to implement custom logic and for integration with other services and products)
- ▶ **Lower TCO:** Reducing the TCO by discarding unwanted and malicious traffic at the edge; also, leveraging rate limiting in Cloud Armor to prevent costs incurred by DDoS attacks

Secure Hybrid Workforce

Hybrid workforce has become pervasive for enterprises today with flexible remote and onsite work models. Security has become more complex and often requires secure access service edge (SASE) solutions with security service edge (SSE) capabilities. SSE solutions are being adopted by organizations to provide secure access to enterprise applications and SaaS and to help protect the distributed workforce. However, users connecting to SSE experience higher latency for private apps as SSE solutions rely on encrypted tunnels over best-effort internet links to reach private applications across clouds.

Organizations also find it difficult to bring their high-bandwidth on-premises user traffic into SSE platforms for security inspection due to complex networking. As a result, they often deploy on-premises firewalls instead. To help businesses standardize on a common SSE stack of their choice for securing access for all their hybrid workforce and enabling optimal user experience, Google Cloud has partnered with Palo Alto Networks' Prisma Access and with Broadcom Secure Web Gateway to offer these vendors' SSE solutions natively in Google Cloud and as part of the Cross-Cloud Network solution.

Cross-Cloud Network can direct all on-premises user traffic to the SSE solutions hosted in Google Cloud. After security inspection, traffic is routed to applications in Google Cloud or over Cross-Cloud Interconnect to other clouds. Because the security stack is deployed natively in Google Cloud, there are no tunnels or overlay networks required, allowing the stack to perform at its best. Businesses could gain security controls and up to a 35% reduction in network latency, according to Google Cloud's data. This is based on the native integration of the SSE solutions into Cross-Cloud Network.

Closing Thoughts

Networking Is the Foundation to an Efficient Multicloud Infrastructure

The core value propositions of multicloud networking and security — i.e., resilient and multi-gigabit-speed intra and inter-cloud network and services layer connectivity, end-to-end security, internet-scale application and content delivery, and programmability, are increasingly a need-to-have versus a nice-to-have for organizations worldwide, as they action their AI and digital transformation journeys.

A supportive data point is IDC's *FERS Wave 11 Survey* of 881 IT and business decision makers worldwide noting that 55% of enterprise buyers are actively implementing multicloud networking strategies. The 55% datapoint is a core anchor for IDC's view on multicloud networking starting to inflect this year.

Journeying through the rest of this paper, we discuss the capabilities of full-stack multicloud networking platforms, such as Google Cloud's Cross-Cloud Network, for offering enterprises a simplified and easy-to-operate solution that eliminates complex bespoke networks and provides higher-performance, lower-latency, and embedded security across multiple cloud and on-premises environments.

Cross-Cloud Network is built on a global-scale and high-performance network and service-layer connectivity framework for enabling IT and application developers to optimize workload deployment and accelerate the application development life cycle — driving measurable IT and business outcomes.

Focus use cases we highlight for Cross-Cloud Network include:

1. Distributed applications and AI/ML workloads
2. Internet-facing applications and content
3. Secure hybrid workforce

A differentiated value proposition of Cross-Cloud Network is to enable organizations to utilize application services from multiple cloud provider environments. This is key for building a distributed application stack utilizing different layers hosted by different cloud providers — and for application and digital business resiliency, among other business outcomes.

From an AI/ML lens, Cross-Cloud Network makes it possible to implement a global-scale cloud infrastructure for actioning distributed AI/ML inferencing, along with the related data sets, across cloud platforms. The GenAI workflow, in particular, runs on multiple public, hybrid, and edge cloud platforms for reasons of data and model gravity, economics, and inferencing user experience, etc. This is a key driver, in IDC's view, for utilizing global-scale multicloud networking, security, and application delivery for actioning enterprise AI/ML workflows.

Heading into 2024 and beyond, IDC sees globally relevant internet-facing applications placing heightened demand on hyperscale cloud and edge infrastructure platforms. IDC's primary research indicates that edge programmability, security, networking, and open APIs are trending as top-of-mind for IT practitioners and business application owners across the content creation, delivery, and payments ecosystem.

A key customer value proposition of multicloud networking is a “global front-end” capability — i.e., the ability of modern multicloud networking platforms such as Cross-Cloud Network to serve as a global front end for massive-scale internet-facing applications such as gaming, sports events, and streaming media. The application environments are often situated in a diverse range of cloud platforms and even on premises.

Another key value proposition of multicloud networking is the ability to “elastically scale” cloud networking services and manage customer-specific security and IT policies across public, private, and edge cloud platforms via automation and workflow orchestration and analytics capabilities. These features are accessible via a single pane of glass.

Secure hybrid workforce is a post-pandemic use case that is built on complex on-premises and public cloud networking and security architectures such as SASE with SSE capabilities.

In this context, native SSE stacks available within Cross-Cloud Network meaningfully simplify how organizations implement secure and distributed remote and in-office workforce capabilities.

Bigger Picture

Multicloud networking, in IDC's view, is enabling business-critical technology capabilities for enterprise buyers to accelerate their AI and digital transformation journeys. This is for composing, delivering, and monetizing a dynamic mix of legacy and modern IT services and applications securely and with consistent performance across global-scale cloud infrastructures — for differentiated IT and business outcomes.



Appendix: Supplemental Data

This appendix provides accessible versions of the data for the complex figures in this document. Click “Return to original figure” below each table to go back to the original data figure.

FIGURE 1A SUPPLEMENTAL DATA

Is Multicloud Networking Starting to Inflect?

	Top Use Case	Second Use Case
Running distributed enterprise applications across on-premises, hybrid, and public clouds for application resiliency and improving cybersecurity posture	40%	37%
Running generative AI (or, broadly, AI) workloads across on-premises, hybrid, and public clouds	32%	34%
Delivering global-scale internet-facing applications, such as gaming, video streaming, and ecommerce	25%	26%
Don't know	3%	3%

n = 881; Source: IDC's *Future Enterprise Resiliency and Spending Survey, Wave 11, December 2023*

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FIGURE 4 SUPPLEMENTAL DATA

Content Delivery Network Providers

	Use More Than Two Providers	Use Two Providers	Use One Provider	None
Total	23%	46%	27%	3%
Financial services	33%	44%	20%	3%
Manufacturing and resources	31%	50%	18%	0%
Government	13%	38%	25%	13%
Education	13%	48%	30%	4%
Healthcare	16%	47%	33%	5%
Retail/wholesale trade	11%	45%	39%	5%
Business/professional services	23%	46%	30%	1%
Other services	29%	43%	14%	0%
Transport/utilities	19%	33%	37%	7%

n = 600; Source: IDC's *U.S. Enterprise Communications Survey, August 2022*

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FIGURE 5 SUPPLEMENTAL DATA

Top CDN Provider Considerations

	Total	500–999 Employees	1,000–4,999 Employees	5,000+ Employees
Security	67%	69%	68%	63%
Performance	59%	57%	65%	56%
Network capacity/scalability	57%	58%	64%	49%
Global footprint	46%	44%	47%	46%
Cost	44%	41%	43%	48%
Latency	35%	30%	37%	38%

n = 600; Source: IDC's U.S. Enterprise Communications Survey, August 2022

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About the IDC Analyst



Vijay Bhagavath

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Vijay Bhagavath is IDC's Research Vice President, Cloud and Datacenter Networks. He provides actionable thought leadership and pragmatic insights on cloud and datacenter networking markets and technologies. Vijay has a deep understanding of the overall networking market, technologies, product road maps, competitive differentiation, and deployment strategies, enabling him to provide insightful commentary and guidance for vendors, cloud providers, enterprise IT buyers, and practitioners.

[More about Vijay Bhagavath](#)

Message from the Sponsor



Google Cloud Cross-Cloud Network simplifies and secures applications and users for enterprises operating in cloud-native, hybrid, and multicloud environments. With innovative products such as Cross-Cloud Interconnect, Cloud NGFW, Private Service Connect, and a programmable global front end, Cross-Cloud Network accelerates business outcomes and digital transformation.

▶ **Up to 35% Improved User Experience**

- Lower latency for hybrid workforce via an integrated SSE solution
- Improve reliability with Google Cloud's planet-scale encrypted backbone

▶ **20x Higher Security Efficacy**

- Improve threat protection with Cloud NGFW
- Protect with ML-powered security

▶ **Up to 40% Reduction in TCO**

- Connect applications in multiple clouds with high-performance, natively encrypted connections via Cross-Cloud Interconnect
- Natively insert network services to provide simple, ubiquitous controls for any connection

Our global network platform is open, secure, and optimized for applications and users across on premises and clouds. We invite customers and partners to join us on this cross-cloud journey.

[Learn more about Cross-Cloud Network](#)

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