

Partner Opportunity in a Cloud World

How Partners Are Winning in the Google Cloud Economy

An IDC eBook, sponsored by Google Cloud

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Introduction

This IDC eBook, sponsored by Google Cloud, provides partners with actionable insight into the shape and value of IT market opportunities. More important, it brings to life how partners are capitalizing on those opportunities through their own value creation within the Google Cloud economy.

Google Cloud partners are riding the wave of cloud adoption to engage customers across the life cycle, from cloud assessments and shifting existing workloads, to building cloud solutions based on AI/ML to solve industry-specific challenges. This engagement model has become a recipe for success for partners with a keen focus on their own services and software in alignment with customer needs and accelerated through the Google Cloud portfolio.

Google Cloud partners are riding the wave of cloud adoption to engage customers across the life cycle.



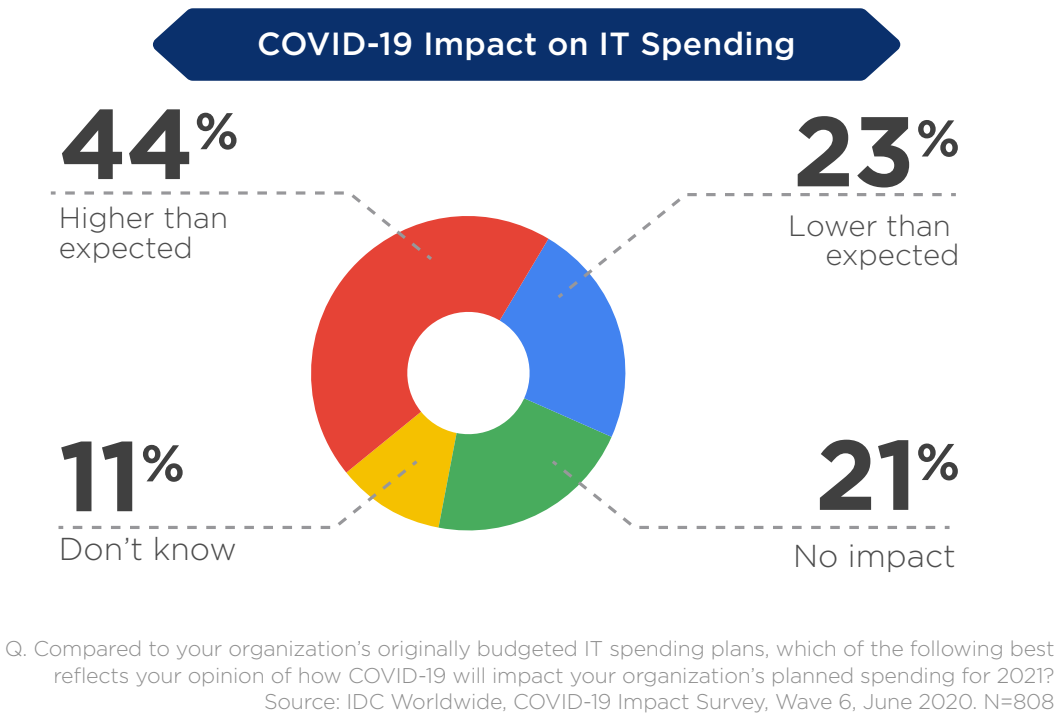
Cloud Market Acceleration and Google Cloud Partner Alignment

The COVID-19 Impact Challenge

In an IDC survey, end customers worldwide reflected on how the COVID-19 crisis was expected to impact their 2020 IT spending plans. Although 40% were forecasting lower spend, 54% indicated either no change or an increase in spend. For 2021, 66% indicated no change or a spending increase.

There is potential for continued steady spending, provided those customers that are increasing their spend can take up the slack from those that are lowering it. This could minimize the COVID-19 impact on customer IT spending, and by extension vendor and partner revenue, especially outside of industries that were more adversely affected, e.g. retail and travel. Plus, accelerated growth is expected once the crisis abates, as end customers plan and execute on their continued digital transformation journeys, which is where partners are well positioned to benefit.

However, spending on IT is now much more tied to value. In another IDC survey, many end customers were reevaluating transformation projects in a bid to find greater ROI and efficiencies from those implementations. This should come as no surprise to partners focused on solutions that provide business impact, which will benefit from close strategic relationships with clients — that is, understanding the business and quantifiable value of the solutions being deployed.



It's one thing to put in the system, but it's a whole other thing to get customers to use and embrace it, to become passionate about it, but that's our specialty.

— Mitch Greenwald, Cloudbakers CEO and founder

The approach of being close to customers should serve partners well through any challenges that may arise, even one as big as COVID-19. In fact, a customer success model, where partners engage for the long term to help shape customer strategy, can go hand in hand with a cloud focus and recurring revenue model. That ongoing cycle of engagement can lead to both customer satisfaction and partner economic health. In addition, partners are working with customers that view COVID-19 as an opportunity to transform.

One example of a partner that takes this approach is Cloudbakers, a Google Cloud Premier partner based in the United States that designs, builds, and runs systems using Google Cloud technology. Its leadership has

remained confident throughout the COVID-19 crisis because of its recurring revenue model and focus on change management within its customer base.

"It's one thing to put in the system, but it's a whole other thing to get customers to use and embrace it, to become passionate about it, but that's our specialty," said Cloudbakers CEO and founder Mitch Greenwald, adding that both G Suite license sales and GCP consumption from its MSP motion has been a salve in bad times. "Our consumption and license revenue through COVID-19 has been foundational — it's helping us weather the storm."

IT Market Still in Growth Mode

IDC's latest spending forecasts show businesses worldwide **investing \$1.3 trillion in 2020 across software, services, and hardware.** More important is that each IT category is expected to grow over the previous year, with services this year being the biggest at \$571 billion.


Software

\$315B 24% of total IT spend, a **13% increase over 2019**


Services

\$571B 43% of total IT spend, a **9% increase over 2019**

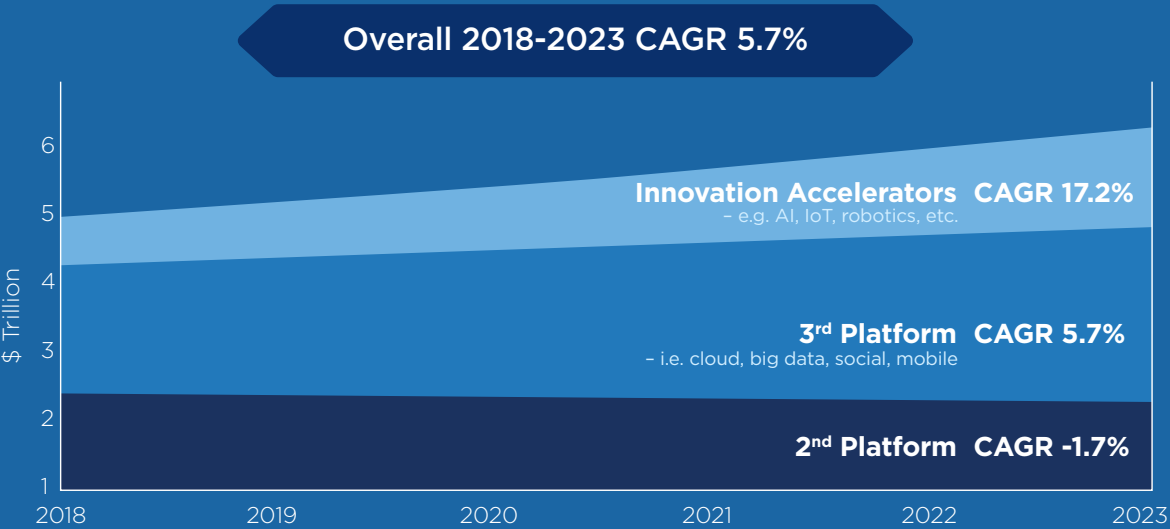

Hardware

\$435B 33% of total IT spend, a **10% increase over 2019**

Perhaps a more important view of market opportunity is in spend across leading versus legacy technologies. Even though overall IT spend is expected to grow 5.7% over the next five years, much higher growth is coming from what IDC calls the 3rd Platform (i.e., cloud, big data, social, and mobile) and innovation accelerators (i.e., AI, IoT, next-gen security, augmented/virtual reality, robotics, and 3D printing). The 2nd Platform, which has negative growth, includes hardware, software, and services related to client/server rather than the cloud.

Innovation accelerator growth rates are expected to be the highest, at 17% over the next five years. The 3rd Platform also has low double-digit growth — but only when mobile, the growth of which has slowed, is removed.

This is good news for Google Cloud partners, who by their nature are engaged across many of these technologies, positioning themselves squarely in the two growth categories. Doing so makes it possible for these partners to help meet the needs of end customers looking to execute further on their business transformation journey.



Source: IDC Worldwide Black Book: 3rd Platform Edition, May 2020



Consider the IDC view of the public cloud market opportunity, with a growth rate of 23% between SaaS (18%), PaaS (30%), and IaaS (33%). Cloud also presents a robust picture regionally, with the Americas growing at 22%, APJ at 31%, and EMEA at 22%.

Google Cloud Partners Maximize Cloud Growth

Google Cloud partners are benefiting from and embracing the surge in public cloud adoption. That fact was validated by the findings of an IDC survey of Google Cloud partners globally that revealed average year-over-year revenue growth of their Google Cloud business of 35% (and 20% of partners cited Google Cloud business growth of 75% or more).

Combine those growth rates with an average margin of 34% that partners make on their own IP (defined as intellectual property that includes services and software created and sold by partners) in Google Cloud deals and it points to healthy businesses. Of course, partner IP margin will vary greatly among project-based services, managed services, and software, but many Google Cloud partners are embracing all of these.

Partner IP surrounding the Google Cloud portfolio is also helping customers enhance their digital capabilities and business functionality.

Mike Conner, founder and CEO of Appsbroker, a Europe-based Google Cloud Premier partner, calls it "creating digital parity with Google" for customers, and references the science fiction writer William Gibson's adage: "The future is already here — it's just not very evenly distributed."

That helps frame Google Cloud partner focus and strategy, which is to ensure that digital capabilities are distributed among their customers through a combination of partner IP and a wide array of Google Cloud-specific solutions across application modernization, data management, smart analytics, infrastructure modernization, security, artificial intelligence, and productivity and collaboration. "When we deliver a business outcome, it usually cuts across modernizing applications, and the associated infrastructure, and the data," said Conner.



Partner IP surrounding the Google Cloud portfolio is helping customers **enhance their digital capabilities and business functionality.**

Cloud Solutions and Partner Value

A Focus on Transformation



The Google Cloud partner ecosystem represents a diverse group of companies, but one common theme among them is their focus on transforming end-customer businesses through Google Cloud technology and their own skills and IP. It’s about getting customers to the cloud, but it’s equally about helping customers operate and innovate in the cloud to maximum business benefit.

The cloud market continues to evolve, and while lift-and-shift engagements are abundant, many partners are taking customers into cloud-based solutions that address business outcomes. This is an approach that requires partners to engage across a spectrum of activities, including project-based services, managed services, software development, and resale.

Google Cloud Partner Value Acceleration



The confluence of lift-and-shift activity and business-specific cloud solutions is a tide that has elevated Google Cloud partner engagement and growth. In fact, the Google Cloud partner economy (i.e., the very tangible revenue drivers and multiples that partners experience from being a Google Cloud partner and that come from deals involving Google Cloud solutions) is expansive.

IDC developed a partner economic model to determine the value of the Google Cloud partner economy using the vendor’s revenue and growth and its partner ecosystem revenue and growth, plus IDC’s extensive IT market data and forecasts. A survey of Google Cloud partners globally was used to validate assumptions.

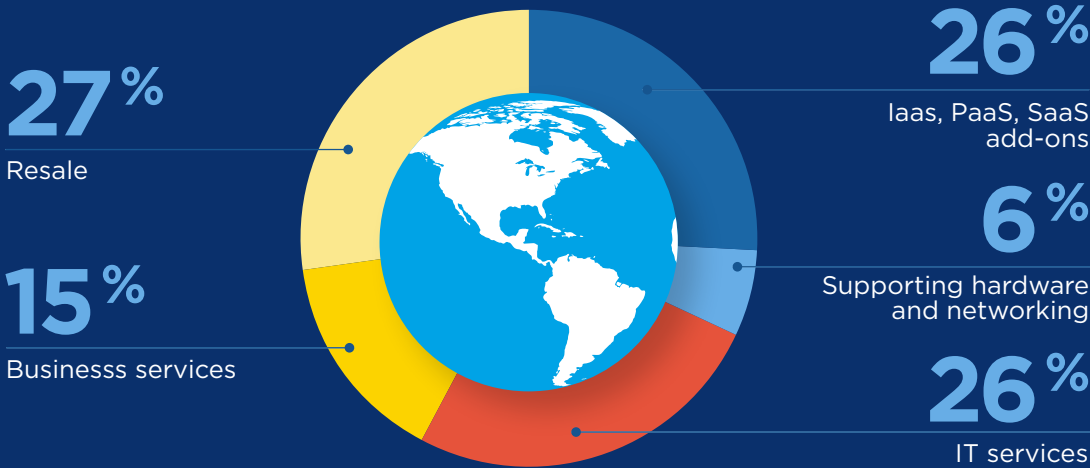
The result of the model is IDC’s forecast that partner revenue from Google Cloud opportunities will more than triple by 2025. Over the next six years, the accumulation of net-new partner revenue will reach \$341 billion.

Looked at another way, for every \$1 of Google Cloud technology sold in 2020, partners will generate \$5.32, predominantly through their own offerings (services and software) but also from resale margin. By 2025, that number will top \$7.54. This is the value created in partner businesses based on their relationship with Google Cloud.

According to IDC forecasts, not only is Google Cloud partner revenue growing faster than Google Cloud’s revenue, but the net margin opportunity of \$121 billion through 2025 will also be well distributed across partner activities. IT and cloud services created and sold by partners will represent 52% of partner net margin, and resale 27%.

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Worldwide Ecosystem Margin Opportunity 2019-2025



Source: IDC Google Partner Economic Model, 2020

Resale share of partner margin is an interesting outcome. Many Google Cloud partners are benefiting from the vendor’s promise of 100% partner attach, and the managed-services model has been a boon for many

around consumption of GCP. Resale of Google technology also provides the means for partners to reinvest in other parts of the business to add more value to customer engagements.

Beyond Lift-and-Shift

The Google Cloud partner experience of lift-and-shift projects is as a commodity — or more succinctly, an activity that gets them in the door so they can do more with their own IP to differentiate and drive customer value. From a partner business perspective, this makes a lot of sense given that partner IP can stretch to as high as 85% gross margin on software, and 30% to 50% on professional and managed services.

Bespin Global is a Google Cloud Premier partner with a cloud MSP service offering that ranges from resale and managed services to cloud consulting services and proprietary cloud management software. "Our mission is to help customers adopt cloud, and we can't do that without building our tools. It's a bit harder up front, but it produces more revenue and profit," said CEO and cofounder John HanJoo Lee.

Bespin Global, with offices in Korea, China, and Dubai (UAE), has grown its Google Cloud resale to \$20 million in the last 12 months and expects it to double to \$40 million this year, even though it has a cloud-agnostic strategy. The partner's success relies on a focus on GCP — landing customers with GCP and expanding its footprint with cloud services and software. An example of Bespin's approach is showcased in its client Netmarble, a Korean gaming company, for which the partner migrated to GCP from other platforms. "We've been able to lead with GCP, and once we get our foot in the door,

we've expanded our reach," said Lee, adding that CEOs and CIOs recognize the need to have all data in one place, which also creates a huge market for Google's Bigtable and BigQuery technology.

For Google Cloud Premier partner Incentro, helping out customers solely with lift-and-shift is not a focus at all; instead, the Netherlands-based company engages in customers' digital strategy by choosing the cloud migration approach that best suits the client's skill set and culture. "We're not in the lift-and-shift business. We want to start with the digital strategy and introduce a cloud-native culture — the technology naturally follows," said Helmer Baas, Incentro Sales Director & Co-owner.

More important, taking this path helps build a strategic footing in accounts, and in many cases leads to greater value for the customer and Incentro. Incentro, like other Google Cloud partners, has found that its services and software are the enablers for strategic solutions, like moving away from legacy applications toward cloud-native solutions.

In addition, Incentro's GCP business is scaling fast on its digital engagement strategy with customers. "Project-based services are hard to scale, so we started to resell GCP and it's scaling much faster. Our existing customers are accelerating cloud adoption and we're continually adding new customers," said Baas.



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— Helmer Baas, Incentro Sales Director & Co-owner

This is how it works for many Google Cloud partners – doing proof of concepts and pilots, proving their value and the value of the Google Cloud technology in a quantifiable way to customers. The goal is to show initial success and value, leading to additional phases to solve the customer’s business challenges. Maven Wave, a Google Cloud-focused services firm that was acquired by global systems integrator Atos in early 2020, is a good example of this.

Maven Wave initially sold and implemented G Suite at an insurance company in the western U.S. When the team discovered the need for a 360-degree view of its customers, the relationship expanded to a migration to GCP BigQuery from five data stores. “Once we migrated them, they could get a solid single view of their customers, and we were then able to add much greater value by applying machine learning to the data to gain predictive customer insights,” said Partner Jason Ruge. “From there they asked us to migrate additional data stores and 3rd party data for an even deeper understanding of their customers. So it was an evolution, showing value at each step.”

Within two years, GCP consumption at Maven Wave’s customer went from less than \$1,000 a month to nearly \$100,000 a month as more workloads were moved and they continued to do more on the platform. “We started

small with this customer, but now it’s growing into something that’s very meaningful. Leveraging our strengths we can turn a G Suite project into a data warehouse project into application development to meet the evolving needs of our clients and add tremendous value,” said Ruge.

Similarly, LATAM-based Google Cloud partner Xertica works with customers to define business goals prior to doing the work in building out a solutions framework. “We create the business-based customer road map, build a solutions framework, and run proof of concept to demonstrate how it can work for the customer,” said CEO Antonio Couttolenc.

That approach leads to architecting the solution, which could be everything around designing, enabling, and modernizing the customer’s environment. Once the solution is deployed, Xertica has its own support and managed services capabilities, which were born from its GCP business.

“Working with GCP we were able to create and integrate complex solutions and build managed services, which dramatically changed our services composition,” said Couttolenc, adding that the company has shifted the business to very high-impact and margin opportunities. Data analytics projects, as an example, can be as high as 70%.



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– Antonio Couttolenc, CEO, Xertica

Google Cloud Partner Digital Transformation and IP

Reaching for Digital Maturity

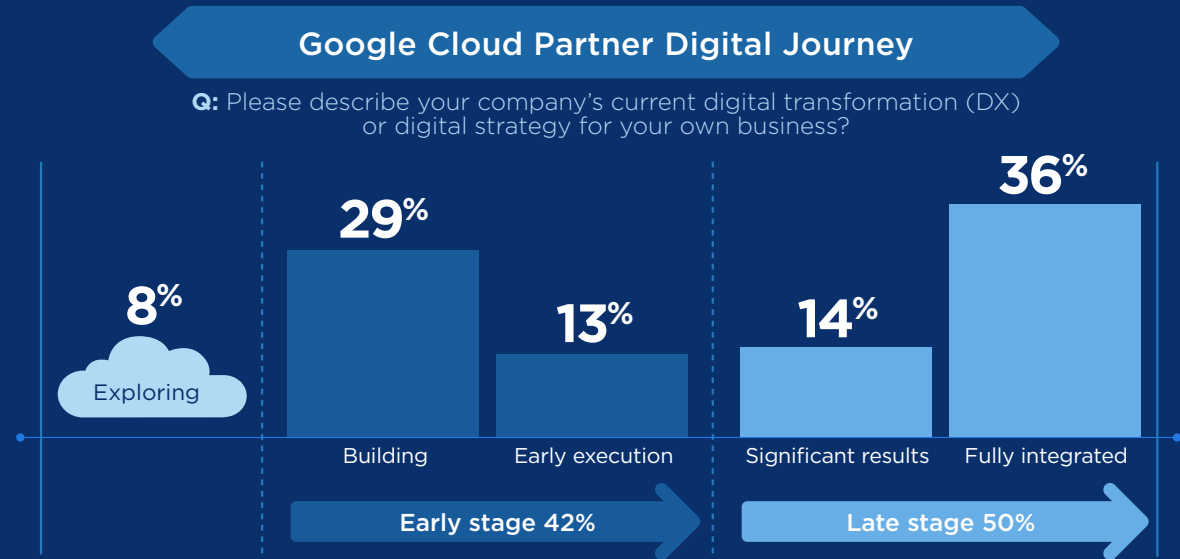
Like their customers, Google Cloud partners are realizing digital transformation in their own businesses. This was clear in IDC’s survey of Google Cloud partners globally, which shined a light on where they sit relative to their journey. IDC defines five phases of partner digital maturity, beginning with those that are exploring options and continuing all the way up to those partners that have a fully integrated digital strategy.

Most Google Cloud partners are engaged in developing or executing on their digital strategy, with 50% in the late stages of digital maturity. In fact, the highest proportion of Google Cloud partners (36%) has fully integrated digital into their strategy and business. The importance of this is that transformative partners will be most adept at adapting and thriving in evolving market conditions and with technology advancements.

Partner digital transformation, similar to customers’, is a complex process that has an impact on the businesses’ leadership, culture, people, processes, and org structure, as well as all functional areas including sales, marketing, operations, software development groups, services groups, and human resources. Because partners must think about all of these impact points while continuing to drive business with customers, it’s important to have a planned approach to transformation. It makes sense to focus on one area before starting on another, to prevent spreading the business too thin, because all of this takes time, resources, and money.

Google Cloud partners are engaged in their own journeys of digital transformation, with **50% in the late stage of digital maturity.**

Source: IDC Google Partner Survey, Feb 2020, N=209



However, Google Cloud partners at the highest stage of digital maturity stand out compared with other Google Cloud partners in a number of key ways. The partners that have made the investments to accelerate their digital transformation have higher revenue growth, specifically Google Cloud business growth, and greater involvement in solutions areas such as

IP as Differentiator

Google Cloud partners are making investments in their own IP. IDC’s Google Cloud partner survey revealed 36% of partners investing 6% or more of their revenue on this endeavor. Those investments are being made across the spectrum of IP, with a specific focus on managed services, cloud services, and project-based services. These become important differentiators for partners, as well as drivers of partner profitability.

data management and smart analytics. More of these partners are also in the Build category of the Google Cloud Partner Advantage program, meaning they’ve made investments in developing their own cloud software and benefiting from high relative profitability because of it.

Cloudbakers (mentioned earlier in this eBook) performs custom application development work for clients using Google App Engine, analytics, data warehousing, and AI as well as using Google APIs to enhance the customer experience.

Digital Maturity Differentiation

	Average Google Cloud Partner	Fully Digitally Integrated Google Cloud Partner*
Google Cloud Revenue as % of Total Business	36%	49%
Ratio of Google Cloud Build Partners	44%	56%
Overall Partner Revenue Growth – YoY	32%	42%
Partners’ Revenue Growth related to Google Cloud – YoY	33%	45%

Source: IDC Google Partner Survey, Feb 2020, N=209

*Fully Digitally Integrated = partners that have digitally transformed their businesses across sales, marketing, operations, and HR. 36% of respondents (self-classified)

“Build is where you get that special sauce for your clients, something to differentiate them,” said Cloudbakers CEO and founder, Greenwald, citing an application the partner built on GCP for a product distribution client, using AI for form recognition. The outcome was an order throughput improvement of 70% through automation of store orders across different formats.

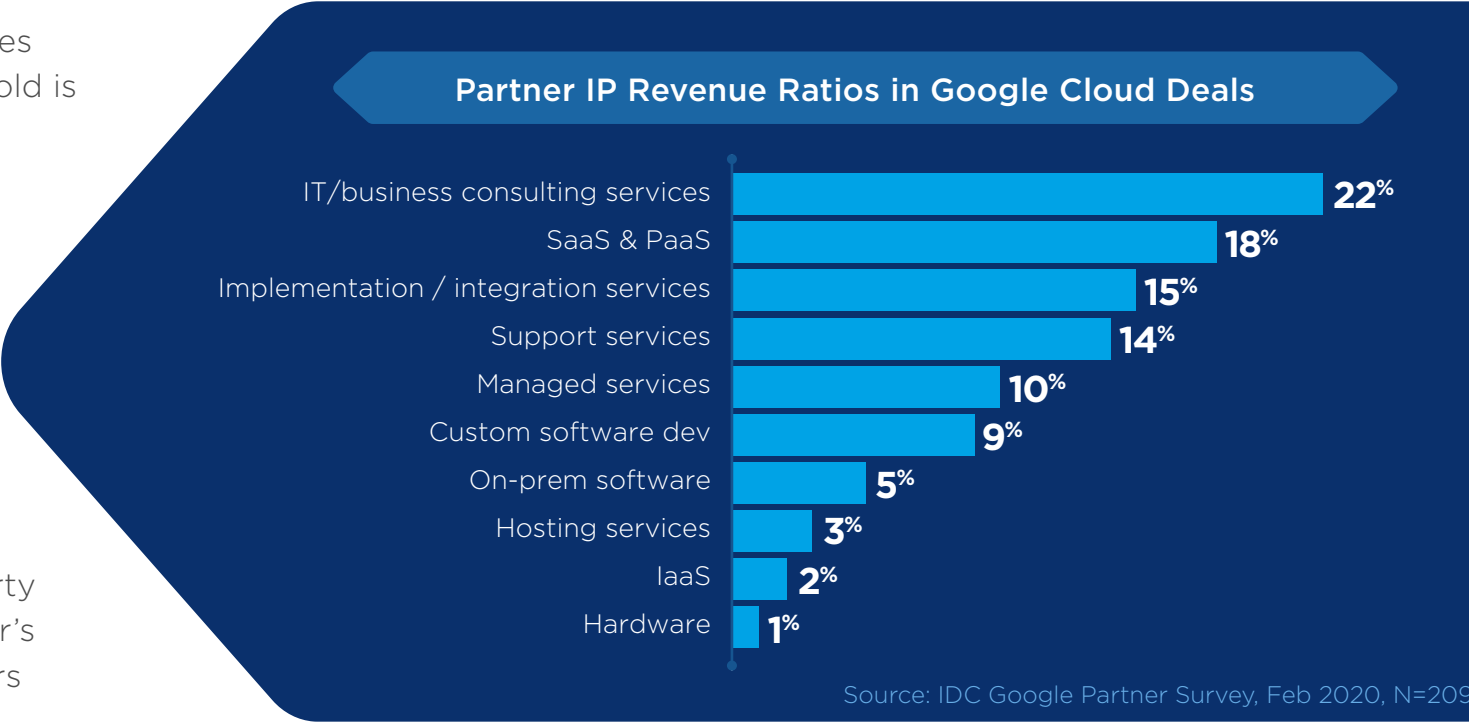
Equally important to its success is Cloudbakers’ customer success team. This group works on customer retention and expansion, which includes providing security and road map briefings, analyzing how customers are using the solutions, and exploring further needs of the business. “The customer success reps are not trying to sell; they’re there to be an advocate for our clients,” said Greenwald, which leads to deeper engagements for the partner’s IP.

However, on average, 66% of Google Cloud partner revenue comes from their own IP. In Google Cloud deals specifically, partner IP sold is dominated by IT/business consulting services, cloud software, implementation/integration services, support services, and managed services, among others. This is where the value in the multiplier of the Google Cloud relationships makes its impact.

Singapore- and India-based cloud consulting partner CloudCover, which focuses on the confluence of DevOps, data, and API integration, recently developed and launched its first SaaS product. Strato allows customers to create dashboards to monitor complex cloud systems holistically, combining metrics from the infrastructure, applications, third-party monitoring tools, and security. Strato originated from CloudCover’s managed services activities, which speaks to the value of partners

knowing their customers and developing software and services to meet that need and make it repeatable.

CloudCover spends its time and resources on planning and executing advanced cloud solutions, specifically around infrastructure automation, data management, and AI. This is where partner revenue, as a ratio of a deal, and margin start to jump. “The value from the services needed to build a cohesive data platform can surpass the value of GCP consumption, especially when using cloud-native services like BigQuery. We expect more revenue to come from products and reusable solutions (that are automated to a large degree) than from just pure services,” said cofounder and CEO Vishal Parpia.

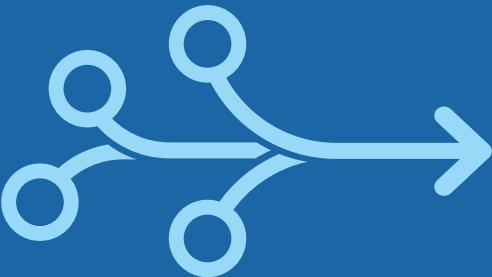


Global partner EPAM Systems, an integrator focused on transformation projects, builds accelerators. That simply means identifying areas where customers have common issues and helping them avoid or overcome them with a developed solution. An example is EPAM's TelescopeAI solution, a unified platform designed to support the digital transformations of adaptive enterprises.

For EPAM, it's about optimizing the use of cloud for clients' businesses across industries. In many cases, the customer relationship starts with lift-and-shift projects before it gets into the creation of customized solutions that integrate AI and machine learning. "In many cases, we start with lift-and-shift projects before moving to more innovative, customized solutions that integrate with next-gen technologies," said Arseny Gorokh, head of EPAM's Google Cloud Practice.

At that point it moves to building machine learning prototypes to transform business functions to understand user experiences and predict behavior. "When we get to transformation, which is our goal, it's about application modernization or machine learning," said Gorokh, adding that this is where EPAM's services grow, especially considering transformation projects can run over years.

These are representative examples of how partners are capitalizing on the IT market opportunities through their own value creation within the Google Cloud economy. Partners are riding the wave of cloud adoption to engage customers across the life cycle, which has become a recipe for success for partners with a focus on their own services and software and the Google Cloud portfolio.



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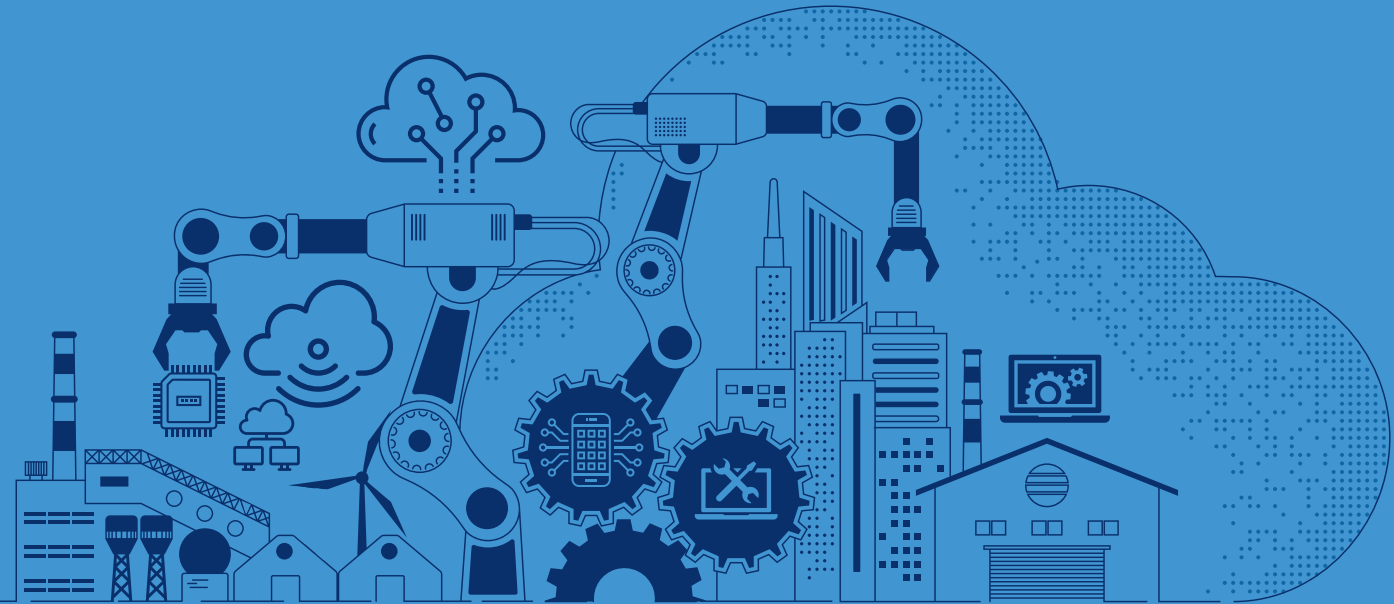
Conclusion

This eBook provided IDC's perspective on the opportunity available to partners in their relationship with Google Cloud and its technology. The findings were based on a survey of 209 partners and interviews with 12 partners from across the globe, as well as IDC's partner economic impact model.

It is evident that Google Cloud partners are engaging in a range of activities to deliver cloud solutions to end customers, with success being defined by their own services and software aligned to customer needs and the Google Cloud portfolio. By their nature, Google Cloud partners benefit from the technology growth categories of the 3rd Platform and innovation accelerators, which are important for end customers to execute further on their business transformation journey.

More important for Google Cloud partners and their customers is that the cloud market continues to evolve beyond lift-and-shift engagements to cloud-based solutions that address business outcomes. That helps frame the Google Cloud partner focus on a wide array of Google Cloud-specific solutions across infrastructure modernization, data management, smart analytics, application modernization, security, artificial intelligence, and productivity and collaboration.

This all leads to the confluence of lift-and-shift and business-specific cloud solutions elevating Google Cloud partner engagement and growth, where partner revenue from Google Cloud opportunities will more than triple by 2025 to an accumulated net-new partner revenue of \$341 billion. That number represents the value created in partner businesses based on their relationship with Google Cloud and its technology.



Partner revenue from Google Cloud opportunities will more than triple by **2025 to an accumulated net-new partner revenue of \$341 billion.**

Appendix

Region	Value Statement
Worldwide	According to IDC, the Google Cloud partner opportunity worldwide will increase by more than 3.6X by 2025. Worldwide, IDC expects Google Cloud partners to generate \$5.32 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$7.54 by 2025.
North America	According to IDC, the Google Cloud partner opportunity in North America will increase by more than 3.3X by 2025. In North America, IDC expects Google Cloud partners to generate \$5.17 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$7.17 by 2025.
Western Europe	According to IDC, the Google Cloud partner opportunity in Western Europe will increase by more than 3.7X by 2025. In Western Europe, IDC expects Google Cloud partners to generate \$5.49 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$7.74 by 2025.
DACH	DACH (Germany, Austria and Switzerland)- According to IDC, the Google Cloud partner opportunity in DACH will increase by more than 2.7X by 2025. In the DACH region, IDC expects Google Cloud partners to generate \$6.36 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$6.79 by 2025.
UKI	UKI (United Kingdom & Ireland) - According to IDC, the Google Cloud partner opportunity in UKI will increase by more than 2.9X by 2025. In the UKI region IDC expects Google Cloud partners to generate \$6.45 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$7.53 by 2025.
Nordics	Nordics (Denmark, Finland, Norway, Sweden) - According to IDC, the Google Cloud partner opportunity in the Nordics will increase by more than 2.9X by 2025. In the Nordics region, IDC expects Google Cloud partners to generate \$6.60 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$7.56 by 2025.

Appendix

Region	Value Statement
Asia Pacific	According to IDC, the Google Cloud partner opportunity in Asia Pacific including Japan will increase by more than 4.4 X by 2025. In the Asia Pacific region, IDC expects Google Cloud partners to generate \$5.73 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$7.78 by 2025.
Japan	Japan - According to IDC, the Google Cloud partner opportunity in Japan will increase by more than 5.2X by 2025. In Japan, IDC expects Google Cloud partners to generate \$5.37 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$7.20 by 2025.
India	India - According to IDC, the Google Cloud partner opportunity in India will increase by more than 3.7X by 2025. In India, IDC expects Google Cloud partners to generate \$6.11 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$8.33 by 2025.
ANZ	ANZ (Australia & New Zealand) - According to IDC, the Google Cloud partner opportunity in ANZ will increase by more than 2X by 2025. In the ANZ region IDC expects Google Cloud partners to generate \$6.66 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$7.39 by 2025.
Latin America	Latin America - According to IDC, the Google Cloud partner opportunity in Latin America will increase by more than 5.2X by 2025. In the Latin America region, IDC expects Google Cloud partners to generate \$5.94 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$8.91 by 2025.
Brazil	Brazil - According to IDC, the Google Cloud partner opportunity in Brazil will increase by more than 5.4X by 2025. In Brazil, IDC expects Google Cloud partners to generate \$5.39 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$8.96 by 2025.
Mexico	Mexico- According to IDC, the Google Cloud partner opportunity in Mexico will increase by more than 6X by 2025. In Mexico, IDC expects Google Cloud partners to generate \$5.64 USD in revenue for every \$1 of Google Cloud products sold, increasing to \$8.67 by 2025.

About the Analysts



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Paul is focused exclusively on providing research-backed guidance to leading software and cloud vendors on partner strategy. In his role, Paul extensively studies vendor and partner dynamics as they relate to and impact go-to-market strategy with partners. This includes analysis of business models and practices in the development, implementation, and management of effective partner strategies across the ecosystem.



Steve White, Program Vice President, Channels and Alliances, IDC

Steve manages a group of channels and alliances analysts as well as their related research products. Steve also works with the Strategic Alliances Leadership Council (SALC) members to define and research the key topics that affect strategic alliance investments, and provides analysis into alliance trends, best practices, and benchmarking. In the past few years this has included in-depth council discussions on cloud, economic pressures on alliances, key performance indicators, and alliance organizational best practices.

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