

The Business Value of VMware Cloud Foundation for Broadcom's VMware Cloud Service Provider Partners



Ladislav Kinda
Consultant,
Business Value Strategy Practice,
IDC



Andreas Storz
Senior Research Manager,
EMEA Partnering Ecosystems,
IDC



Stuart Wilson
Senior Research Director,
EMEA Partnering Ecosystems,
IDC



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Executive Summary

The simplification of VMware by Broadcom's product portfolio under Broadcom ownership has significantly reduced the number of products offered by the vendor. The overall VMware Cloud Service Provider (VCSP) partner ecosystem has been streamlined for greater efficiency, and Broadcom has initiated a new co-selling model with its corporate accounts and license portability for all VMware Cloud Foundation (VCF) consumers, allowing customers to work with Broadcom, partners, or a combination of both. The new partner engagement framework also provides enhanced clarity for VCSP partners in terms of the support and collaboration they can expect from Broadcom and its field sales organization. VCSP partners working with Broadcom now have an opportunity to position VCF as a complete infrastructure-as-a-service (IaaS) solution of choice for customers to maximize both customer and partner benefits and return on investment.

IDC spoke with VCSP Broadcom partner organizations that provide VCF products and services to their customer base. Throughout the course of four in-depth interviews, IDC aimed to research the business value (BV) of offering the VCF solution for Broadcom's VCSP partners. The participating partner organizations were asked to appraise in detail the effect of VCF on the quality and attractiveness of their customer-facing services, revenue growth, and IT and operational team productivity. Aside from the direct effect of offering VCF products and services to their customer base for partner organizations, IDC also asked Broadcom partners to provide feedback about the benefits VCF brings to end users within the partner's customer base.

The interviews and the following research indicate that Broadcom partners offering VCF products and services are achieving:

- Enhanced business development and the emergence of new business opportunities by capitalizing on VCF's functionality, established market position, and ability to offer product and managed services bundles
- Additional sales to existing VCF customers by selling other products and services on top of the initial VCF solution
- Greater sales penetration for data and modernization services courtesy of the VCF platform's agility, including AI workloads
- Improved IT staff productivity for both partner and customer organizations owing to the infrastructure management maturity of the VCF solution

Business Value Highlights

- ➔ **\$164.7 million**
in average annual revenue from VCF-related services
- ➔ **\$21.3 million**
in annual revenue growth for the average interviewed partner
- ➔ **50%**
of existing VCF customers bought additional services
- ➔ **200%**
more VCF customers use self-service and full-service functionality
- ➔ **482%**
more customers are buying data services with VCF

Situation Overview

Broadcom is now focused on driving full adoption of VCF as a complete IaaS stack that can provide customers with a subscription-based private cloud platform that enables innovation and true workload portability to wherever workloads are deployed. Partners remain central to Broadcom's strategy, leveraging their expertise and existing relationships to accelerate customers' digital transformation journeys through VCF deployment. VCSPs play a pivotal role in the delivery of VCF to Broadcom's corporate customers as a managed service provider.

Customers that choose to run VCF in clouds operated by VCSP partners can leverage a highly efficient cloud operating model that provides the scale and agility of public clouds coupled with the security and performance of private clouds. VCSPs can offer a genuinely sovereign cloud solution, fully compliant with local data residency and regulatory mandates, unlike hyperscale clouds subject to foreign jurisdiction. This ensures that VCSPs provide a cloud service that truly embodies sovereignty in every aspect.

Broadcom recently announced that more than 90 VCSP Pinnacle Partners have joined the Broadcom Advantage Partner Program since February 2024. A Pinnacle partner designation validates a cloud provider's deep technology and services expertise around VCF, along with the proven ability to solve customers' complex workload challenges.

VMware Cloud Foundation

VCF offers a unified path to hybrid cloud through an integrated IaaS software platform that serves as a foundation for both private and public cloud environments. VCF provides a complete set of software-defined services for compute, storage, network, and security, along with cloud management capabilities. This combination of services aims to provide a simple, secure, and agile cloud infrastructure that can be deployed on premises or consumed as a service from public clouds.

Customers can realize a consistent IaaS solution experience, and with Broadcom they now have the option of license portability of their VCF software to any compatible endpoint — whether that is in their own datacenter, a hosting provider, a cloud service provider, or a hyperscaler cloud environment. With VCF, customers can benefit from the scalability and agility of a public cloud, coupled with the security and performance of a private cloud.

Broadcom VCSPs can also offer customers more options by delivering highly specialized managed services and [sovereign cloud services](#) that support data residency, high levels of compliance, and other jurisdictional controls, while helping customers quickly achieve maximum value from VCF as they accelerate their digital transformation to the cloud. Broadcom's simplified product portfolio has also allowed it to accelerate its transition to making subscription models the standard opex-orientated purchasing format. Broadcom, working in combination with partners, believes that subscription models will help customers realize the benefits from continuous product innovation, with faster time to value and predictable costs.

Business Value of VMWare Cloud Foundation

Firmographics and Organizational Usage

The data presented in Table 1 offers a broader context regarding the firmographics of the interviewed partner organizations. The average partner's overall customer base comprised of 680 customers (with a median of 375). The average revenue of the interviewed partner organizations was \$1.1 billion. The organizations were headquartered in North America, with two in the U.S. and one in Canada. Of the four conducted interviews, three were used for the purposes of quantitative research and all four provided qualitative data. The synergy of both quantitative and qualitative data is a core element of IDC's business value methodology.

TABLE 1
Firmographics of Interviewed Organizations

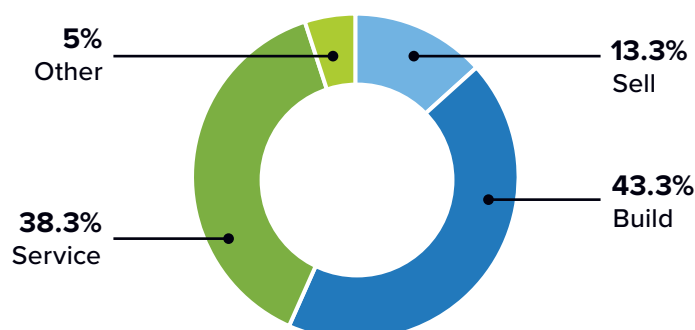
	Average	Median
Overall Partner Customer Base	680	375
Annual Revenue	\$1,117,883,300	\$204,000,000
Countries	U.S. (2), Canada	

n = [3]; Source: IDC Business Value Research, June 2024

The findings presented in **Figure 1** provide a deeper understanding of the revenue Broadcom partners derive from VCF products and services split by activity area. The “Build” and “Service” categories represented most of the revenue, at 43% and 38%, respectively. The revenue pie was rounded out by “Sell” with 13% and “Other” with 5%. The “Build” category represents major cloud-based solutions aimed at driving transformational change; the “Service” category includes deals where partners provide or procure solutions to meet customers’ software, hardware, peripherals, and other needs; and the “Service” category is where partners provide customers with services like cloud computing from initial implementation to ongoing management.

FIGURE 1

Revenue Breakdown by Areas of Activity

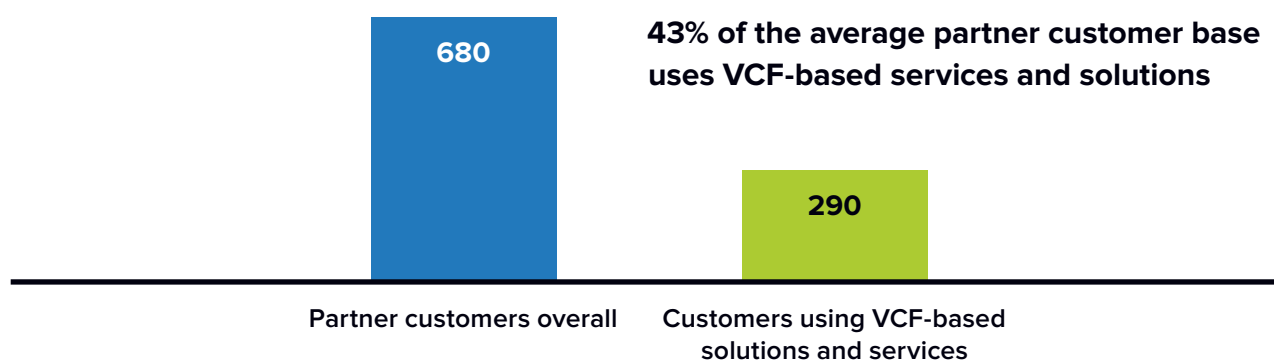


n = [3]; Source: IDC Business Value Research, June 2024

To put the data from the previous figure into proper context, IDC also asked partner organizations to share the number of their customers that are already using VCF-based products and services following Broadcom’s acquisition of VMware in 2023. For the average partner, the share of their customer base using VCF-based products and services was 43%. That translates to 290 out of the reported overall 680 customers. This is visualized in **Figure 2**.

FIGURE 2

VCF-Based Products and Services Adoption



n = [3]; Source: IDC Business Value Research, June 2024

The Business Value of VMware Cloud Foundation for Broadcom VCSP Partners

Study participants reported a diverse array of benefits produced by offering VCF products and services to their customer bases. The first area of benefits presented in detail is business benefits. IDC was able to research the positive effects VCF has for customers using partner-managed cloud services, which partners reflected in business and revenue growth, both from a quantitative and qualitative point of view. Overall, the interviewed Broadcom partners reported that VCF allows them to offer new and innovative services that resonate with their customers, whilst improving the quality and user experience for existing VMware-based cloud services.

Presented in more detail below are the responses from the interviewed organizations relating specifically to business benefits:

Sales Facilitation:

"VCF provides us with an established brand, whereas in the past we would have to create our own. This has created an ease of going into the market and helps us facilitate sales by no longer having to start from the ground up and explain what exactly our product does."

Bundling of the Solution:

"With VCF sold as a bundle of products and managed services, we can offer simplicity to our customers — in contrast to selling a solution 'piecemeal,' which can mean laborious additions of software. With VCF, our organization can offer a packaged solution with more included in the base price, making it an easier sell."

Subscription-Based Model:

"It's the fact that we are selling the service on a subscription basis as opposed to a capitalized enterprise license agreement (ELA). With subscriptions being opex, we are more easily able to sell to a growing number of organizations that are moving to an opex model to manage their P&L."

Solution Flexibility:

"With VCF, we can offer our customers full platform flexibility. Wherever customers are on the spectrum — from 'just want to worry about workloads' to 'want to manage all the details' — we can facilitate it. All our solutions are based on VCF at the ground level and we can build flexible solutions based on what the customer needs."

The interviewed partner organizations told IDC that on average they had VCF-based annual revenue of \$164.7 million at the time of the interviews. As a percent of average partner revenue, this equals around 15% of total revenue, although the three interviewed partners' VCF-related revenue ranged from 11% to 50%, with an average of 34%. These figures reflect the significant extent to which VCF already drives their customer-facing service portfolio and business results.

The interviewed partners further reported experiencing annual revenue growth of 13% with VCF products and services. The data in **Table 2** shows a breakdown of the annual growth with the help of the data from **Figure 1** (Revenue Breakdown by Areas of Activity). With an assumed static growth rate and revenue distribution, the average partner organization can expect annual revenue growth of \$21.37 million, mainly driven by the two most prominent categories of "Build" (\$9.26 million) and "Service" (\$8.19 million). On top of revenue growth, the interviewed partner organizations also told IDC that VCF-based solutions helped their organizations to increase their sales pipelines by 35% on average.

TABLE 2

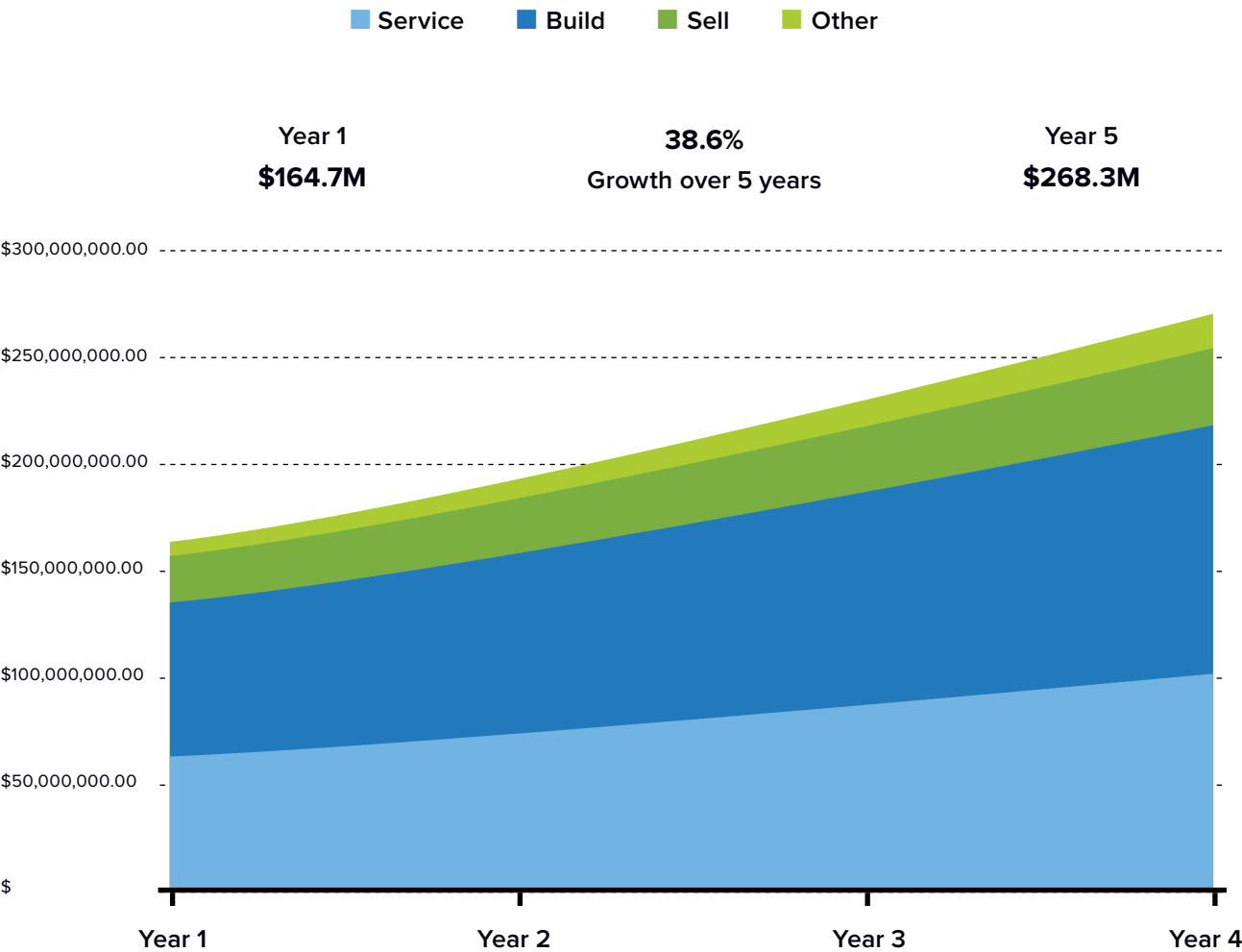
Revenue Growth by Areas of Activity

Revenue growth by type of service	% customer-facing services	Revenue before VCF	Revenue growth
Build	43%	\$71,362,800	\$9,262,800
Service	38%	\$63,128,600	\$8,193,900
Sell	13%	\$21,957,700	\$2,850,000
Other	5%	\$8,234,200	\$1,068,900
Overall	100%	\$164,683,300	\$21,375,600

n = [3]; Source: IDC Business Value Research, June 2024

With the figures presented in **Table 2**, IDC was able to calculate a five-year impact on the average partner's revenue associated with VCF-based solutions and services (Figure 3). IDC applied a constant 13% double-digit revenue growth rate across the researched five-year period. The average organization's VCF related revenue increased by 38.6% in the researched timeframe — from the initial total of \$164.7 million to the eventual total of \$268.3 million, representing a benefit of over \$100 million. These findings are also broken down by area of activity — \$44.9 million for "Build," \$39.7 million for "Service," \$13.8 million for "Sell," and \$5.1 million for "Others."

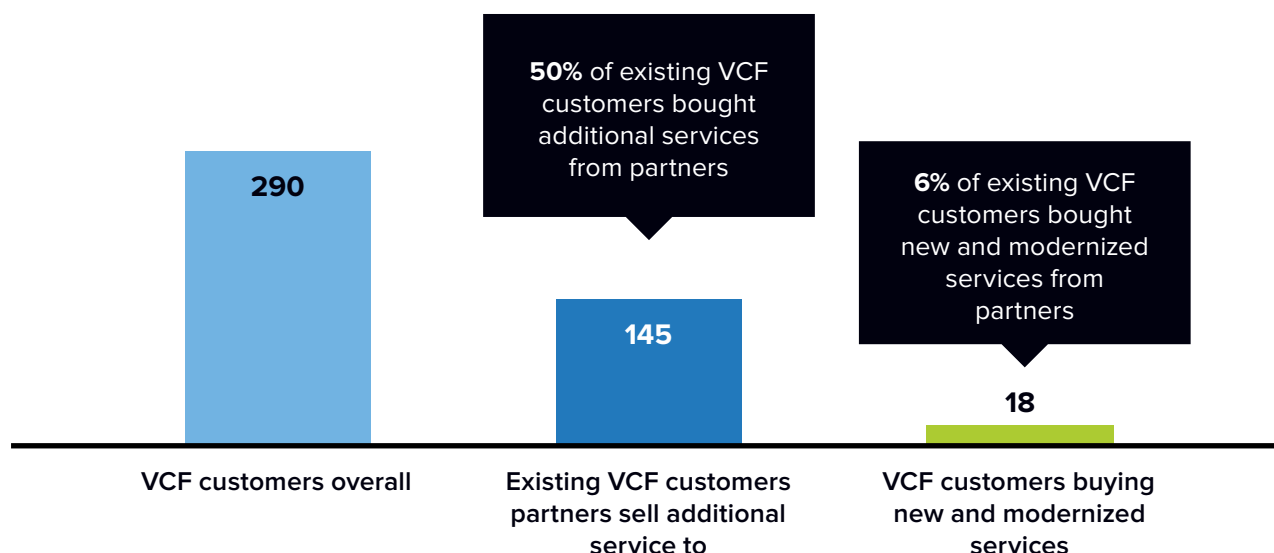
FIGURE 3
Revenue Growth over a Five-Year Period with VCF



n = [3]; Source: IDC Business Value Research, June 2024

IDC also inquired whether partner organizations have leveraged established relationships with their existing VCF customers for new sales. Partner organizations reported that, on average, with VCF they have made net-new cross sell to 50% of their VCF customers. In absolute numbers, for the average partner this development meant that 145 of the 290 VCF customers bought additional services or solutions like logging, providing the customer with higher observability and greater telemetry for analytical data usage. IDC also asked about the purchase of new and modernized services, like Kubernetes and DevOps services added on top of the VCF stack. There the partners reported a 6% success rate of additional sales to existing VCF customers. This data is presented in **Figure 4**.

FIGURE 4
Sales Enablement with VCF



n = [3]; Source: IDC Business Value Research, June 2024

Partner organizations also told IDC that the agility and deployment speed of VCF enables them to accelerate their time to market and that they can establish service differentiation thanks to their confidence in deployments being quick and reliable with VCF. The theme of faster deployment continued, with partners telling IDC that VCF enables rapid deployment with increased automation and additional capacity with virtualized storage and simple scalable units of VCF. IDC also learned that VCF partners value the robust ecosystem of features surrounding the solution, ensuring the ability to offer enterprise-grade technology to a vast spectrum of customers. Partners also noted that “efficient and standardized operations” enable them to focus on operational matters from the very start of a customer-facing project, instead of on build-related activities.

The feedback related to these types of operational enablement are presented in full below:

Faster Go-to-Market:

“The time we need to invest and test has shortened with VCF. Coupled with improved agility, we’ve been able to accelerate our go-to-market. For our customers, this has meant that they can leverage existing infrastructure to deploy new technology very quickly.”

Adding Capacity Quickly:

“With VCF, we can offer good life-cycle management, a rapid speed of deployment, as well as adding capacity to our clients’ environments. To put it simply, we can expand quickly with confidence.”

Ecosystem of Features:

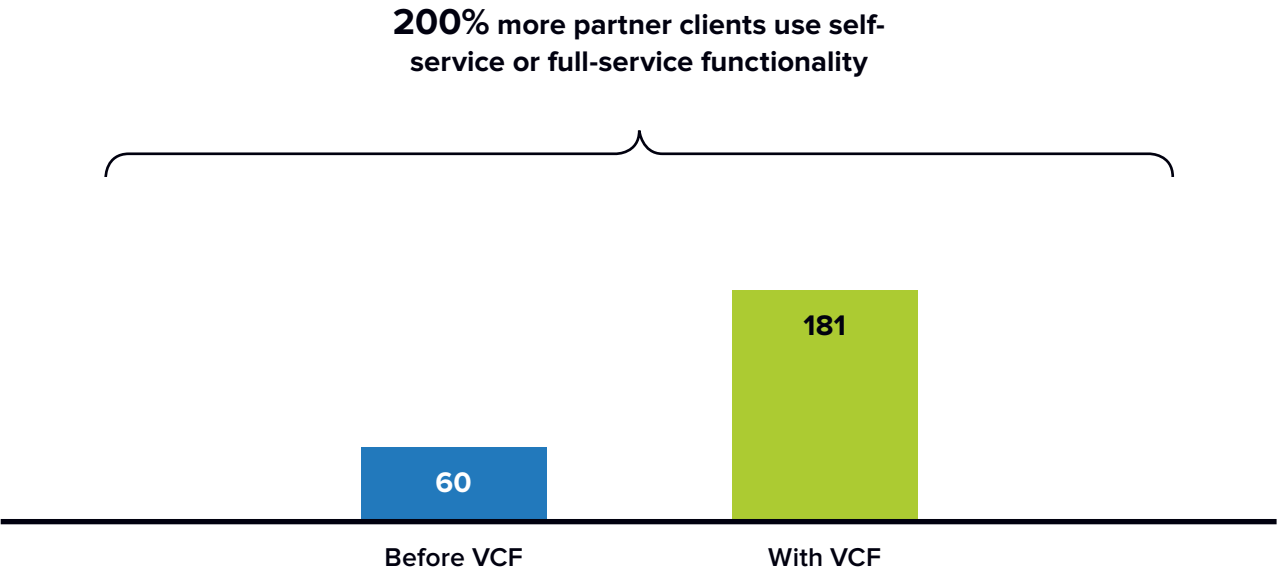
“From an IT and operational standpoint, Broadcom is the market leader in offering the most features, coupled with a deep ecosystem of knowledge on how to optimize and ensure the best possible experience. We can offer our clients enterprise-grade technology, even if they are not enterprise sized. With VCF, we curate several enterprise solutions that we provide for hundreds of other clients in a manner that not only scales but enables them to not have to learn all those different technologies. We build it all in.”

Efficient Standardized Operations:

“We can focus on other things. VCF is about automation of deployments, from the root up to data operations. It takes care of Day 0, Day 1, and Day 2 operations. With VCF, we can focus more on the operations and not on the build so much.”

IDC also gathered specific data points about discrete areas of technological improvement and service differentiation with VCF. The first of these areas is the increase in usage of self-service functionality among partners' VCF customer bases. Partner organizations reported a substantial growth of VCF customers using self-service functionality. For the average partner, the number of customers using self-service or full-service functionality grew from 60 to 181 with VCF, a benefit of 200%. For example, one partner organization told IDC that, with VCF, they can deliver greater control for their customers over their data and data security with a private cloud in a hybrid context — a highly salient benefit for customers seeking to establish and run highly secure hybrid IT environments.

FIGURE 5
Self-Service and Full-Service Functionality Usage with VCF



n = [3]; Source: IDC Business Value Research, June 2024

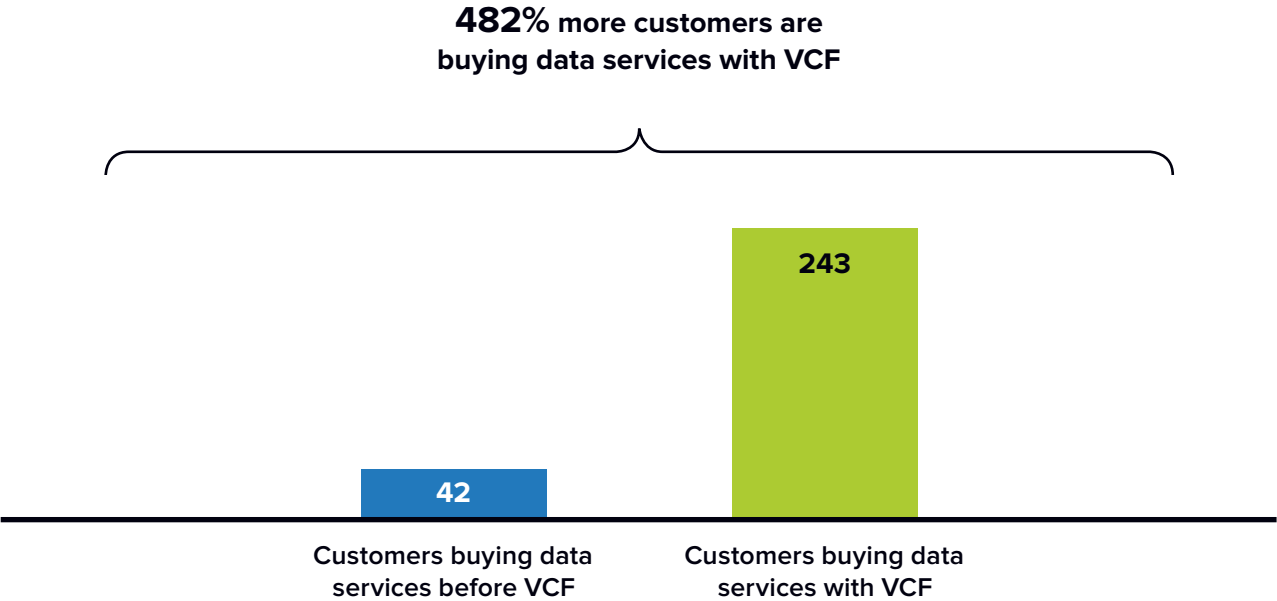
IDC also researched the area of data services usage by partner customers. With VCF, the average partner organization saw an increase in the number of customers buying data services of 482% (i.e., a gain of almost six times). Initially, just 42 partner customers used data services, but with VCF this number grew to 243 for the average partner organization. Partner organizations were able to provide data services like data logging for greater observability or vector databases for AI inference, coupled with higher efficiency of updates, reduced testing costs, and improved agility.

The interviewed partners provided examples of data services use cases that resonate with their customers:

One interviewed partner reported using VCF exclusively as a platform upon which their customers could realize their data-related needs and tasks.

- Offering data services with VCF has emerged as a robust solution for customers, with features like logging providing VCF-using customers with more observability for their applications and greater telemetry for their analysis of usage patterns.
- Offering AI cloud workloads from one of the leading AI workload providers within the VCF framework.
- Providing SQL database services to their VCF customer base, while their AI workload offering is still in the early stages of growth.

FIGURE 6
Customers Buying Data Services with VCF



n = [3]; Source: IDC Business Value Research, June 2024

IDC also asked interviewed partners about data sovereignty and security with VCF. One partner organization told IDC that with VCF they have full control over the infrastructure, and in contrast with competitor solutions, they can offer their customers end-to-end visibility both on premises and in the cloud. This is very important in the regulated industries of finance and banking, healthcare, and the public sector, which this particular partner is targeting with VCF-based security solutions. The quote describing this partner's outlook on data security and sovereignty with VCF is presented in full below:

“VCF is a critical part of our sovereign cloud, which touches 80% of our customers. It's the number-one thing we lead with — it's a big differentiator for us. We have full control of the VCF infrastructure. With our top competitors, you would have to rely on their security specifications, and not see who does what behind the scenes. Whereas for our VCF-enabled infrastructure, law enforcement, government, banks, they all want to have end-to-end visibility. We can do that for them both on premises and in our own cloud.”

Another partner also told IDC how with VCF it can offer more advanced networking-based security offers with features such as micro-segmentation and the ability to have integrated virtualized security appliances providing faster automation and efficiency for security services.

The interviewed partners also identified the benefit of improved efficiencies for their own operations. One partner organization told IDC that with VCF their own IT staff saw a 20% increase in productivity. This organization mainly attributed this benefit to VCF's philosophy of integration, which enables the partner to avoid integration at scale owing to the way the solution is built. Commenting on the 20% improvement in IT staff productivity, this partner said: “A part of the IT staff productivity improvement is the packaging, the philosophy, the integration — we don't need to be able to maintain our own. The integration, the way VCF's built, saves us the hassle of doing that work at scale.”

Customer Views on VCF-Related Services

IDC asked partners about what they have heard from their customers in terms of their VCF-related services.

Partners told IDC that their VCF-using customers talk to them about the agility and business focus enabled by VCF. With VCF, their customers stated they are able to scale and update their infrastructure more readily as well as optimize their resources with greater efficiency. Similarly to the partners, VCF-using customers also saw improvements in IT staff efficiency and derived benefits from the sovereign cloud capabilities offered by VCF and surrounding managed services. The quotes gathered from partner organizations talking about their VCF-using customer bases are presented in full below:

Agility and Business Focus:

"VCF enables consistency across deployments for our clients, be it in the cloud or on premises. With VCF, our clients are more agile and can focus on business needs rather than on the back end."

Scaling and Updating:

"The advantage for our customers is good life-cycle management and cluster expansion (scaling up and down). VCF does a great job of packaging all the software products together in tested and validated versions, making updates much more efficient. The ease of adding resources to a customer is fantastic as well."

Resource Optimization:

"When customers come to us, with the help of VCF, we optimize their use of IT resources. This capability is integral to the work we do with our customers."

IT Department Efficiency:

"Yes, clients' IT staff are more efficient because we're providing them with environmental management. The clients are already using VMware software, so all they're trying to do is get out of the business of managing it. All that value is coming from our team."

Sovereign Cloud Capabilities:

"The main reason our customers choose us is the sovereign cloud capabilities. Yes, all our customers have gotten benefits out of the platform."

Apart from receiving qualitative quotes about the impact VCF has on their customer base, IDC was also able to gather insights about the perceived customer impact of VCF on certain metrics, which although not directly reported, indicate a strong value add for VCF customers:



60% increase

in productivity
for customers' IT
management staff, based
on one partner interview.



45% increase

in customers'
infrastructure utilization
on average, based on two
partner interviews.



31% savings

on infrastructure on
average compared to the
customer's prior solution,
based on three partner
interviews.

One partner told IDC that with VCF it is able to deliver electronic health records (EHR) and enterprise resource planning (ERP) capabilities from leading market providers on highly available configurations, resulting in a zero-downtime platform for the end user.

Challenges/Opportunities

Broadcom customers will have access to simplified VCF pricing, and partners will be able to realize a streamlined margin structure and related benefits from the new partner program that customers can take advantage of. The revamped VMware partner program offered by Broadcom is designed to drive close commitment and deeper engagement with highly valued Broadcom Advantage partners and Broadcom customers. Partners will also have the potential to grow their revenue opportunities by aligning VCF alongside adjacent managed services, professional services, and solution offerings.

The focus on standardization and consistency of the routes-to-market employed for VCF means that customers will be able to more quickly get the benefits of their investments in VCF as partners deliver services based on the same VCF software that customers deploy on premises. Customers also have license portability for VCF, allowing them to move subscriptions between on premises and certified VCSP or any certified cloud endpoint. This creates another opportunity for partners to initiate discussions and provide customers with the option to move from self-managed to an outsourced managed services model and realize a return on their investment in VCF faster.

Allowing customers to create a consistent hybrid cloud experience creates an opportunity for partners to differentiate themselves and demonstrate their value-added credentials based on their managed services capabilities and specializations that customers need for their mission-critical workloads.

By focusing its VCF partner engagement model through a select number of focused partners, Broadcom will create the conditions for deeper collaboration and cooperation with these partners. Broadcom is committed to aligning its field sales team alongside partners' sales teams to improve go-to-market coordination and embark on co-sell initiatives within the corporate customer base to improve the overall customer experience with VCF.

Conclusion

The simplification of VMware by Broadcom's product portfolio has led to a more efficient VCSP ecosystem, fostering direct engagement and co-selling models with corporate and strategic accounts. This transformation has enabled partners to offer VCF as a complete IaaS solution and focus on lucrative managed services, enhancing customer and partner benefits and ROI.

Through in-depth interviews with Broadcom partners, IDC highlights the significant business development opportunities, sales growth, and IT staff productivity improvements attributed to VCF's agility, including AI workload management. The research underscores VCF's role in driving full adoption as a subscription-based private cloud platform, emphasizing its contribution to digital transformation journeys and the provision of a sovereign cloud solution that is compliant with local data residency and regulatory mandates. Additionally, the paper details the revenue growth and operational efficiencies reported by partners, alongside the positive impact on customers in terms of agility, business focus, and sovereign cloud capabilities. The findings advocate for the strategic value of VCF in enabling partners to leverage established relationships for new sales, differentiate their services, and achieve faster digital transitions for their customers.

Appendix: Methodology

IDC's standard Business Value methodology was utilized for this project. This methodology is based on gathering data from Broadcom's VMware Cloud Service Provider partners offering VMware Cloud Foundation to their customers as the foundation for the model. IDC collected information about quantitative benefits during the interviews using a before-and-after assessment of the impact of offering VCF. For this study, IDC interviewed four partner organizations offering VCF to their customer bases.

IDC bases its financial calculations on a number of assumptions, which are summarized as follows:

- Time values are multiplied by burdened salary (salary + 28% for benefits and overhead) to quantify efficiency and manager productivity savings. For the purposes of this analysis, based on the geographic locations of the interviewed organizations, IDC has used assumptions of an average fully loaded salary of \$100,000 per year for IT staff members and an average fully loaded salary of \$70,000 per year for non-IT staff members. IDC assumes that employees work 1,880 hours per year (47 weeks x 40 hours).

Note: All numbers in this document may not be exact due to rounding.

About the IDC Analysts



Ladislav Kinda

Consultant, Business Value Strategy Practice, IDC

Ladislav Kinda is a Consultant in the IDC Business Value Strategy Practice team. Ladislav conducts customized business value research and consulting projects for clients across various technology domains. His primary focus is assessing the ROI from their adoption of enterprise technologies. Ladislav's research delves into how organizations leverage digital technology solutions and initiatives to enhance efficiency and drive business growth.

[More about Ladislav Kinda](#)



Andreas Storz

Senior Research Manager, EMEA Partnering Ecosystems, IDC

Andreas Storz is senior research manager for IDC's Europe, Middle East & Africa (EMEA) Partnering Ecosystems program. Based in the US, Andreas focuses on the evolution of go-to-market models, new digital value chains and the wider impact on partner ecosystems, exploring how current and future trends will impact the vendor, distributor, and partner landscape.

[More about Andreas Storz](#)



Stuart Wilson

Senior Research Director, EMEA Partnering Ecosystems, IDC

Stuart Wilson is senior research director for IDC's Europe, Middle East & Africa (EMEA) Partnering Ecosystems program. Based in the UK, Stuart has covered global business-to-business and business-to-consumer channels for 20-plus years in a wide variety of research, editorial and event-based roles. Stuart focuses on the evolution of go-to-market models and the wider impact on channel ecosystems, exploring how current and future trends will impact the vendor, distributor and channel partner landscape.

[More about Stuart Wilson](#)

Message from the Sponsor



VCF empowers you to deliver differentiated value propositions through its robust capabilities in hybrid cloud infrastructure, data services, and AI workload management. By leveraging VCF's agility and comprehensive feature set, you can offer innovative managed services that enhance operational efficiency by 60%, optimize resource utilization by 45%, and save customers 31% on infrastructure costs.

With VCF, you can provide a competitive unified cloud platform that combines the scalability and agility of public clouds with the security and performance of private clouds. This ensures compliance with local data residency and regulatory requirements, enabling faster digital transformations while maintaining control over environments.

Partners have seen substantial upsell opportunities, with 50% of existing VCF customers purchasing additional services. This demonstrates how VCF helps deepen customer relationships and drive new business opportunities.

We support you with our streamlined Broadcom Advantage partner program and collaborative [go-to-market initiatives](#). Thank you for being an integral part of our ecosystem.

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IDC UK

5th Floor, Ealing Cross, 85 Uxbridge Road, London, W5 5TH, United Kingdom
T 44.208.987.7100

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