MARKET PERSPECTIVE

2020 Channels and Alliances Predictions

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EXECUTIVE SNAPSHOT

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FIGURE 1

Executive Snapshot: Key Takeaways and Recommended Actions

This IDC Market Perspective provides IDC's top predictions for market and technology forces that will shape IT channels and alliances in 2020 and beyond. As organizations from all industries look to technology to secure their positions, the need for technology experts skyrockets. To take advantage of these opportunities, partners must be technology experts, have deep domain knowledge, and be digital transformation specialists.

Key Takeaways

- Customer success (CX) will become more holistic, combining CX with PX (partner) and DevX (developer) with the objective to measure and ensure a frictionless ecosystem experience for all.
- We will see a radical change in partner program structure in reaction to customer demand and partners' business model changes.
- Most enterprise organizations will become users of technology and vertical industry alliances to address customer and partner business requirements.

Recommended Actions

- IDC advises the vendor community to start thinking about how to extend the concepts and KPIs of CX to the realm of partnering and developer engagement.
- Vendors must take an objective look at their partner programs to see if the current structure is truly serving the needs of their partners and customers.
- Vendors need to validate key alliance partnerships based upon overall corporate needs and should prioritize initiatives to maximize their value to address solution gaps.
- Vendors need to develop their corporate trust program now before their customers and partners demand it.

Source: IDC, 2020

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NEW MARKET DEVELOPMENTS AND DYNAMICS

This IDC Market Perspective provides IDC's predictions discussing the market forces that will shape IT channels and alliances through 2020 and beyond. Starting in 2017, we began a new approach to predictions; rather than staying the course with 10 individual predictions, we identified high-level "uber" themes and then expanded with a few sub-predictions within each of those themes. For our 2019 predictions, the Channels and Alliances team landed on 10 top-line themes taking shape in the ecosystem.

2019 Channels and Alliances Predictions Review

Before discussing our 2020 predictions, we look back at last year's projections and evaluate whether the market conditions we were anticipating came to fruition. If you were tuned in to our predictions webcast, then you may remember our traffic light rating scheme: green light indicating high accuracy, amber light for medium accuracy (maybe we aren't quite there yet or the trend is developing slower than anticipated), and red light for low accuracy. See Table 1 for a brief review of last year's predictions and where we believe we stand today.

TABLE 1

IDC's 2019 Channels and Alliances Predictions

2019 Prediction	Accuracy (High/Medium/Low)	Notes
Ecosystem value (EV) becomes a KPI: By 2022, 30% of spend will be developed and consumed through ecosystems. Ecosystem value will become a key indicator of company worth.	Medium	We are seeing more vendors talk about their ecosystems in monetary terms, and we're seeing more ecosystem business models come to market. But 2022 may be too aggressive in terms of revenue impact.
Partner DX maturity accelerates: By 2020, greater than 50% of ecosystem partners will be in the late stage of digital transformation.	Medium	Close to 40% of software partners and 28% of infrastructure partners are in the late stage of digital maturity as of last year.
Partner to partner (P2P) expands to partner ecosystems: In 2021, 30% of partner-to-partner engagements will involve more than two partners, with many of these forming formal consortia.	Medium	This is increasingly the case, as we're also seeing a diversity of partner types in these collaborations; however, not all 30% are successful.
Partners' focus by use case: By 2021, 65%+ of partners will focus their efforts by vertical or functional use case, with partners building their own services, software, and hardware IP.	Medium	We are seeing a larger percentage of partners focused by use case. By next year, this may well be 65%+ as predicted. Recent research indicates that 48% of partners sell using use cases.
Developer-focused partners are the new normal: By 2021, 90% of partners will have created or acquired the ability to develop custom and/or packaged software.	High	This is still a year to go, but as of the end of last year, approximately 75% of software partners and 45% of infrastructure partners perform this activity.

TABLE 1

IDC's 2019 Channels and Alliances Predictions

2019 Prediction	Accuracy (High/Medium/Low)	Notes
Skills gap becomes critical: By 2022, 30% of all partners and 80% of high-growth partners (thrivers) will invest in a talent program to address a critical skills gap.	High	Our research shows that most partners are investing in next-generation skills in both hiring new talent and reskilling existing talent.
Partner segmentation and success redefined: By 2020, 80% of partners will do all activities, driven by customer demand for solutions.	Medium	IDC research shows that most partners are doing multiple activities, but the majority aren't yet doing all activities.
Distribution replaced by aggregation: By 2023, traditional technology distribution volume will be replaced by high value-add solution aggregation.	High	By 2023, this may be true. We are already seeing all distributors move to an aggregation model. More and more distributors are calling themselves aggregators.
Formal monetization of strategic alliances: Over the next 24 months, there will be significant emphasis placed on the value and rationale of alliances.	Medium	Recent IDC research indicates that joint metrics are gaining acceptance and momentum (57% utilization). However, internal obstacles (politics and corporate culture) are the greatest barriers.
Digital marketing for partners: By 2021, digital marketing certifications/competencies will become a requirement to access benefits in 50% of vendor programs.	Medium	We have seen some vendors starting to require marketing competency to enable funding, but it is not yet widespread.
Mega platforms will dominate partner attention: By 2021, committed partners of the mega platforms will reduce their other vendor relationships by 33%.	High	We have definitely seen an increased commitment to a single platform, although many partners and alliances are still covering their bets with multiple cloud platform relationships.

Source: IDC, 2020

2020 Predictions

In this section, we provide the details of our channels and alliances predictions for 2020 and beyond.

1. CX + DevX+ PX = Frictionless Ecosystem Experience

Over the next five years, customer success will become more holistic, combining customer experience (CX) with partner experience (PX) and developer experience (DevX), with the objective to measure and ensure a frictionless ecosystem experience for all.

Our starting point for this prediction is centered around "the customer" and how the customer's expectations are changing. At the highest level, we see a shift in emphasis from product and features

to the customer's experience of those products and features. Vendors want to be able to measure this and respond to any changes in that experience, and this is what is at the heart of customer experience.

As the topic evolves, the conversations are starting to shift from "How do I get a 360-degree view of the customer?" to "How do I do all of that but also use technology to build a more intimate relationship with those customers?," "How do I do that at scale?," "How do I automate that whole process?," and "How do we do all of this but also ensure that the customer has a frictionless experience across every touch point within our supply chain and ecosystem?"

This is an important point, as the customer journey is rarely a straight path. Relationships are becoming more fluid and elastic, and they are impacted by where those customers are in their journey and, critically, who they are dealing with at that point in time. Most businesses operate within an ecosystem, which raises the question of how do you measure the more elastic nature of these relationships?

CX is complex as it cuts across multiple organizational divisions and silos, whether sales, marketing, operations, services, billing and, of course, those organizational divisions of partners. In a perfect world, all of these divisions, and the partner's divisions, need to be working in tandem and be aligned to measure and improve CX for their shared customers. This requires a degree of data sharing and transparency in a trusted manner, adhering to consent, data privacy, and other regulations. Ultimately, for a frictionless customer experience, all partners need to be delivering on that, too, and be advocates of a customer-centric culture.

Our prediction really focuses on the layer outside the vendor's own organization, the ecosystem, and specifically, the partners and developers. To keep your customers happy, your partners need to find it easy to work with you, and your developer ecosystem needs to enjoy working on your technology. Therefore, CX cannot be viewed only within the confines of your own organization. Instead, it requires a more holistic, ecosystem-centric perspective.

This is further complicated by the fact that partners that are credible in cloud and digital transformation will continue to be in high demand. In turn, they will demand greater personalization and improvements in their own experiences of working with you. This is an area where many vendors fall short and very few truly measure it. The adage "what you can't measure, you can't manage" applies here.

Our prediction, therefore, is that, from 2020 to 2025, we will see an evolution in how the IT industry views customer success and it will become more holistic, combining CX (customer) with PX (partner) and DevX (developer) with the objective to measure and ensure a frictionless ecosystem experience for all.

This requires understanding, measuring, and responding to a variety of perspectives and addresses a changing partner and developer experience. IDC advises the vendor community to start thinking about how to extend the concepts and key performance indicators (KPIs) of CX to the realm of partnering and developer engagement.

We predict that partner experience and developer experience will become key business metrics and measures of success – the more aligned they are to the broader concept of CX, the more successful you will be.

2. Customer as Partner, Partner as Customer

By 2022, 35% of large enterprises will create formal ecosystem partnerships with technology providers, blurring the lines between what is considered "customer" and what is considered "partner."

The shift from linear channel to a more interconnected and complex ecosystem will fundamentally disrupt the way the IT industry is structured. As customers digitally transform, many will create digital businesses that are data driven, platform enabled, and ecosystem centric.

When we talk about ecosystem-centric digital business models, what we are talking about are companies adopting an "outside-in way" of doing business — that is, collaborating, cocreating, and integrating the contributions of multiple organizations, large and small, to aggregate capabilities and drive new innovations. IDC is seeing these digital ecosystem business models crop up across multiple industries such as Siemens, General Electric, Vitality Health Insurance, Nielsen, Adidas, and even the National Health Service (NHS) in the United Kingdom, to name a few. When analyzing these ecosystem business models, it becomes clear that they are challenging the status quo of their relationships with their technology vendors, blurring the lines between what is considered a "customer" and what is considered a "partner."

The industry is still dominated by large RFP-driven modernization projects as companies are looking to automate and transform their IT and are looking for their technology vendors and suppliers to help them with this process. One of the key objectives of digital transformation for these organizations is to work faster, innovate faster, and produce new digital services and products in a far more iterative and agile manner.

These digitally transformed organizations (what IDC calls future enterprises) want to co-innovate, collaborate, and cocreate with technology companies. For example, Sebastien Drews, the former vice president for Digital IT at Adidas, was quoted as saying, "I don't want to talk about vendors and suppliers, I want to talk about partners."

These future enterprises' priorities from their technology vendors and suppliers are starting to shift. Once they have modernized, we tend to see the projects start to get a lot smaller, but more frequent, and the pace accelerates. There is no time for an RFP here.

For this reason, we predict that, by 2022, more than a third of large enterprises (companies like Adidas) will create formal ecosystem partnerships with their technology providers. This shifts the nature of the relationship from one of "IT supplier" to one of collaborative partner operating within a more complex ecosystem of multiple technology partners — from the IT world, from the OT world, from the data world, and from the start-up world.

Customers, like Adidas, will seek to work in partnership with technology providers — in all forms — to achieve specific outcomes in a more iterative and use case–centric manner. The impact is that it's going to become harder to differentiate between what is a partner and what is a customer. This will force a rethink in how vendors structure their field sales organizations and skills, how they commercially engage, and how they contract with their customers. In summary:

- **Projects become more iterative**: As customers digitally transform, deals become smaller, more iterative, and more frequent built around very specific use cases and proof of value.
- **Supplier to ecosystem partner:** The nature of relationship shifts from one of the "supplier" to one of the collaborative partner.
- **Complexity increases**: There will be an increase in the number of stakeholders as customers seek to work in tandem with a selected variety of IT, OT, data, and other partners to achieve specific outcomes.

This will require a fundamental cultural shift from "build and buy" to "cocreate and partner," where the ability to partner (well) will differentiate the leaders from the laggards.

3. Marketplace Dynamics Accelerating

By 2022, marketplaces without a proactive, -valued partner ecosystem will fail.

IDC predicts a rapid evolution of the marketplace landscape during the next two years. Marketplace success will be driven by customer reach, breadth of solutions available, and business benefits for sellers and participating partners. Marketplaces that do not deliver on these core metrics will be marginalized and at much higher risk of failure.

ISVs and partners will become increasingly selective in choosing which cloud marketplaces to engage with, assessing the cost of participation against positive benefits. Marketplaces will increasingly focus on helping consulting and integration partners deliver customer outcomes by facilitating the aggregation of a cross-section of third-party products and partner services.

Marketplaces will increasingly segment by type, based on the business objectives of the marketplace owner, the profile of customer (or partner) base accessed, and the portfolio of solutions and services curated. The value of transactions through a marketplace will become a key performance indicator and the selection criteria for sellers — both ISVs and partners.

IDC has identified four main types of cloud marketplaces based on their operators, core purpose, and functionality. Some marketplaces may cover more than one type, but for the purposes of simplicity in segmentation, the four main types identified are platform-led cloud marketplaces, core software-led cloud marketplaces, distributor-led cloud marketplaces, and independent aggregator marketplaces.

Cloud marketplaces will become digital hubs for ISVs and partners, as well as a platform for buyers to discover and procure solutions from a broader network of suppliers. IDC predicts that marketplace operators will need to focus on delivering a tangible value proposition for customers, ISVs, and partners to drive growth and business sustainability.

4. Partner Program Redesign

Beginning in 2020 and going mainstream by 2023, we will see a radical change in partner program structure.

Legacy channel programs and partner databases have impeded traditional vendors' ability to quickly and efficiently launch new ecosystem-focused go-to-market initiatives. Frequently, traditional programs have been maintained based on inertia and fear of change.

We predict accelerated breakdown of traditional partner segmentation methodologies, which will lead to more vendors embarking on radical overhauls of existing channel programs. Increasingly, fluid and dynamic partner business models will require vendors to radically rethink partner program structures and engagement models to increase flexibility and accommodate partner evolution.

These new partner programs will better incent partners to develop solutions that deliver customers' desired outcomes, providing great value to the customer, partner, and vendor in turn. The new programs will include some or all the following initiatives that we are already seeing in first-mover companies:

- Programs will increasingly focus on partners' vertical/market expertise, with rewards (rebates, discounts, leads, etc.) based on proven expertise rather than revenue.
- Customer ratings will be the basis for expertise measurement.
- The programs will be a blend of traditional channel programs with new nonlinear channel initiatives building toward ecosystem models that also facilitate partner-to-partner (P2P) collaboration.
- Programs will include new flexible and coherent compensation models.
- Programs will include specialized programs by market expertise.
- Ancillary vendor programs for market penetration by dedicated channels (for instance, special enablement, discounting, and marketing for business in public sector) will increase.
- Partner recruiting goals will be to fill white space by industry and use case.

5. Strategic Partnerships Reshape Business Models

By 2024, 90% of enterprise organizations will utilize technology and vertical industry alliances to address customer and partner business requirements.

Evolving business demands are requiring enterprise organizations to reexamine traditional business models. As a result, corporate executives are focusing greater attention on current or possible collaborations to provide cost-effective alternatives to foster market disruption, gaining greater agility and speed for improved time to market, leverage or create intellectual property (IP), or enhance value and trust with customers and partners.

As we have discussed in our other predictions, the introduction of integrated solutions and addressing complex B2P2C (business to partner to customer) solutions offer exciting opportunities. There is a need for greater focus on related development and operational issues, compliance and regulatory compliance, success metrics and related compensation, and company transformation and readiness requirements.

From a partner collaboration standpoint, enterprise organizations will need to address customer and partner demands for enhanced solution and tool integration. As such, greater focus will need to be placed on the ecosystem role in future IT platform development and a product life cycle. IDC feels that enterprise organizations will also place greater prioritization on vertical alliances to address unique customer value expectations and proposition as well as gain trust and creditability in select priority markets.

The adoption of new business models will require enterprise organizations to modify traditional success and evaluation metrics as well as the compensation model to encourage and drive desired sustained collaboration. The emergence of joint metrics and compensation plans will therefore become the norm versus the exception.

6. Disruptors on the Rise

By 2022, partners with integrated digital strategies and valued IP will knock other partners (and potentially vendors!) out of customers.

IDC partner survey data shows a steady increase in the ratio of partners at the highest end of the digital maturity curve, what we call the disruptors. As one example, 13% of SaaS- and PaaS-focused partners were considered disruptors. If that sounds like a small number, consider that disruptors have a fully integrated digital strategy across all functional areas of the business such as sales, marketing, operations, and HR — not an easy thing to do.

More important is that disruptors stand out with important indicators of value and success in their businesses, including investing more in intellectual property (i.e., their own services and software) and higher IP revenue growth, which equals higher profitability.

In addition, partners are becoming more experienced with vertical/functional use case-based solutions, which makes it harder for vendors to compete with partners that have access to multiple vendors and specialize in a micro vertical or a market that larger vendors or partners won't or can't engage in.

All of this can be expected to create some tensions in the field between partners and between partners and vendors.

7. P2P — The Rise of the "Orchestrator"

Over the next three years, at least half of partner-to-partner collaborations will fail due to not having comprehensive stakeholder management (orchestrator) roles in place.

Another consequence of digital transformation and the shift from a more linear supply chain to one of a much more interconnected ecosystems is that it's driving a lot more collaboration between partners. This is not new; we've been talking about partner-to-partner collaboration for some time now. However, what is notable is that, first, we're seeing more of these collaborations and, second, many of these collaborations are failing to produce results.

In fact, we predict that at least half of collaborations will fail over the next three years.

The reason for this is quite fundamental because they don't know how to partner effectively because they do not have a stakeholder management program in place. Central to this is the role of the orchestrator, and this could be the vendor, the primary contractor and, in many cases, the customer, but ultimately, any kind of collaborative business engagement has to have a stakeholder manager (or orchestrator). The orchestrator is the lead person or a group of people who organize and manage the ecosystem, define the strategy, identify potential participants, and clearly define all roles, responsibilities, contributions, and interactions upfront so that all partners know what to expect.

What we see in those that have failed is:

- They haven't thought through what the purpose of the collaboration is, or at least define what it could be like.
- They haven't established that structure and orchestration role.
- They haven't considered how to establish and maintain trust — whether NDA, IP protection, or data sharing.
- They don't measure success, service levels, and customer experience.
- They haven't defined the monetization model, or they haven't created a monetization model where value is accrued by all participants and is beneficial to all participants.
- They're still operating on the culture of "winning" and "getting the largest slice of the pie" when to be successful; a P2P engagement must be run on a culture of growth together.

IDC's advice is to think about how you can support your partners and educate them on each of these elements. When purpose is unclear, or roles are ill defined, there is risk of break of trust.

To protect against a further break in trust, IP protection mechanisms are critical. Similarly, contractual commitments regarding data-sharing agreements and IP contributions must be carefully established. Confidentiality, NDA, and other forms of agreement in place are protecting the competitive secrets of their respective organizations.

IDC also advices that there is time spent in terms of setting performance metrics related to revenue, profitability, and service levels for each partner and the ecosystem as a whole. These should be reviewed and adjusted as needed.

Finally, monetization models must be defined upfront and must be beneficial to all participants. Ideally, these should focus on sharing the value that accrues. And it requires a mindset shift – from "getting the largest slice of the pie" to "building together."

8. The Year of the Algorithm

By 2022, at least one vendor will crack the code in integrating its cloud platform, marketplace, and partner program to provide partners with a single source of truth.

IDC expects 2020 to be the year of the algorithm in partner relationships. It's expected that, by 2022, at least one vendor will have cracked the code in integrating the cloud platform, the marketplace, and the partner program to provide partners with a single source of truth.

This may sound like a tall order, but IDC believes that analytics and big data will be utilized to provide partners with living dashboards, providing always-on, always-current insight into the relationship across all activities with a vendor.

As a starting point, there are early examples of greater integration that have started to emerge, at least as it concerns the digital partner dashboard. But something that may be crucial to execution on both sides, among partners and vendors, will be the level of digital transformation occurring in those businesses to make the delivery and use of such dashboards highly integrated and valuable.

9. Partners Become Edge Experts

By 2023, as many as 40% of partners will become edge experts, as it becomes the largest IT infrastructure repository.

IDC has predicted that the edge will represent the majority (60%) of IT infrastructure by 2023, creating a new category of partner that is an industry edge expert. By 2023, 70% of enterprises will run some level of data processing at the IoT edge, which is frequently at plants, branches, and commerce sites, with multiple locations, remote from the central datacenter.

These customers need to get value from data where it is generated, quickly before the value of that data is diminished. Real-time analysis is needed to be competitive in the digital economy, which is increasingly at the edge in specialized environments. Moving data to a central datacenter does not allow for real-time analysis in most cases due to latency and transit times.

IDC has predicted that, by 2021, 75% of organizations that have embarked on an IoT project will work with a channel partner to strategize, plan, deploy, and/or manage the initiative. Businesses are finding that the implementation of IoT edge locations is complex and is best left to solution providers that have

a proven track record of implementing similar projects. Businesses are looking for providers/integrators with industry-specific apps and systems to move them to implementation faster.

The edge is a big hardware play for vendors, but it will not be the standard hardware deployed in central datacenters. Most of the hardware will be purpose-built systems to fit location/environment and specific use case. Many edge deployments will require new/modified designs that better fit the specific needs of the location and the use case. Customizations may include compact form factors, low-power function and battery backup power, ruggedization for extreme environments, and high-computing capability for inferential analytics. In addition, IDC predicts that as much as 75% of edge infrastructure will be sold as a service.

Specializing in a variety of edge deployment locations (Smart City, water/power plants, manufacturing plants, retail stores, sales branches, and job sites of various kinds) will become a new area of expertise that offers a great opportunity for partners. Partners that sell at the edge will need to develop deep use case–based expertise to succeed at the edge.

10. The Rise of Digital Trust

By 2023, 75% of security-focused partners will expand scope to digital trust.

Privacy will gain salience, becoming fundamental for successful businesses in all industries. IDC has predicted that, by 2022, market demand for tailored experiences will double every six months in more than two-thirds of all industries, bringing the importance of digital trust into focus. The customer must trust the provider of an experience or a service to make a purchase.

Businesses have collected a lot of customers' personal data through websites and apps, in exchange for little or no value in return. We predict customers, led by millennials, will drive a change in this unfair exchange. The California Consumer Privacy Act (CCPA) just went into effect, and like GDPR that impacted policy beyond Europe, CCPA will stimulate similar laws far beyond California. Security breaches and overzealous use of customers' data break down trust. According to IDC's *ConsumerScape 360 Survey,* 60% of millennials feel that companies are collecting too much personal information about them online, while 55% of millennials like websites and apps to be personalized for them.

We predict strong partner adoption of trust products and programs. Digital trust projects are highly strategic, typically led by the office of the CEO or the C-suite. Today, security specializations draw from the best partners. We believe these top partners will expand their services to include trust offerings. Those partners that invest now will have abundant opportunity to grow their businesses profitably.

Technology vendors are not exempt from the need for trust programs, their partners and customers will demand them in the near future. Vendor-offered enablement will be critical for partner success. Vendors also need to update their partner security specializations and/or add digital trust specializations for their partners.

ADVICE FOR THE TECHNOLOGY VENDOR

- **Prediction 1:** Effective CX in the context of ecosystems requires understanding, measuring, and responding to a variety of perspectives and mechanisms to address changing partner and developer experience. IDC advises the vendor community to start thinking about how to extend the concepts and KPIs of CX to the realm of partnering and developer engagement.
- **Prediction 2:** Vendors should start thinking about how they classify "customers" and "partners" so that they are better equipped to manage the fundamental cultural shift required to engage with customers as a partner rather than as a supplier.
- **Prediction 3:** Vendors need to define a marketplace strategy that ensures their products and services are available through the most valuable and influential new routes to market that emerge. Vendors must strike a healthy balance between participation in third-party marketplaces and investment in their own marketplaces.
- **Prediction 4:** Partners continue to transform their business models toward the outcome-generating solution approach, with an increasing percentage of their revenue coming from their own IP. During this transformation, vendors must take an objective look at their partner programs to see if the current structure is truly serving the needs of their partners and customers.
- **Prediction 5:** Vendors need to validate and justify key partnerships based upon overall corporate needs and requirements. In addition, partnership selections should be prioritized to maximize their value and address solution gaps versus duplicate core competencies.
- **Prediction 6:** Vendors should start the process of identifying partner progress on the digital transformation journey so that program and other relationship attributes can be aligned. Focus efforts on nurturing late-stage partners to ensure their influence with clients and enable early-stage partners. Consider adjusting program attributes and/or highlight the benefits for partners on the transformation journey to incentivize partners to continue moving through the phases.
- **Prediction 7:** Vendors should think about how you can support your partners and educate them on each of the elements of successful P2P collaboration.
- **Prediction 8:** Vendors require marketplace strategies, whether it is focused on their own marketplace and/or relationships with third-party marketplaces. Marketplace benefits should be integrated with the partner program to maximize partner engagement and streamline processes. Over time, the marketplace and program should be tied to the cloud platform to capture all activity that occurs there.
- **Prediction 9:** The edge is a great hardware play for vendors and partners, but the pursuit requires customized products. Vendors need to develop the ability to rapidly meet these needs, leveraging their own or a third party's short-run manufacturing capability. Hardware design must be flexible, anticipating a wide variety of form factors and software/firmware customizations.
- **Prediction 10**: Vendors need to develop their corporate trust program now before their customers and partners demand it. Vendors also need to update their partner security specializations and/or add digital trust specializations to enable their partners to take advantage of the opportunity.

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Related Research

- *IDC Worldwide IT Channels and Alliances 2020 Predictions* (IDC #WC20200130, February 2020)
- *Infrastructure Channels Leadership Council Content: The New Value Exchange* (IDC #US45029220, January 2020)
- *Marketplaces and the Partner Experience* (IDC #US44801719, January 2020)
- *Thrivers vs Survivors: What Are the Key Attributes of European Partners that Are Successfully Transforming?* (IDC #EUR144688819, August 2019)
- *Maximizing the Value of Alliances and Outcomes* (IDC #US45006619, April 2019)

Synopsis

This IDC Market Perspective provides IDC's top predictions about the market and technology forces that will shape IT channels and alliances in 2019 and beyond. As organizations from all industries look to technology to secure their market positions, their need for technology experts skyrockets. For channel partners and vendors to take advantage of these opportunities, they must be technology experts but also have deep domain expertise in their customers' needs and be digital transformation experts.

"The shift from a linear channel structure to a more interconnected and complex ecosystem will fundamentally disrupt the way the IT industry is structured." – Steve White, program vice president, Channels and Alliances at IDC

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