



VMware Partner Market Opportunity in a Multicloud World

VMware partners benefit from multiple paths to growth by adding solutions and services

Multicloud Adoption Has Accelerated

According to IDC research, by the end of 2021, **over 90%** of enterprises worldwide will rely on a mix of on-premises/dedicated private clouds, several public clouds, and legacy platforms to meet their infrastructure needs.

56% of organizations use at least two public cloud IaaS providers

63% of WW organizations plan to use multiple clouds to support digital transformation programs in the next 2 years

Worldwide cloud adoption has reached critical mass, but there remains a long runway to broad adoption.



54% have not deployed production applications

AMONG THE 25% OF BROAD CLOUD ADOPTERS:

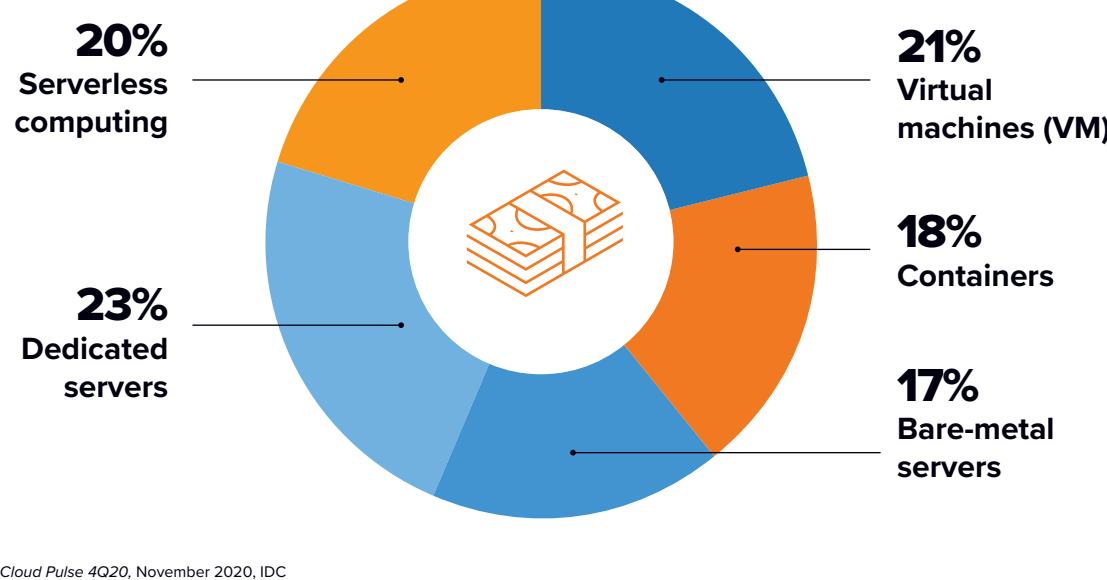
29% of their applications are in a **public** cloud

40% of their applications are in a **private** cloud

Modernization of IT Attracts More Spending

38% of cloud spending goes to containers and serverless computing

Q. For the following, please focus on your cloud budget for different types of compute resources. How is your spending distributed across the following types of compute resources?



n = 1100 | Source: Cloud Pulse 4Q20, November 2020, IDC

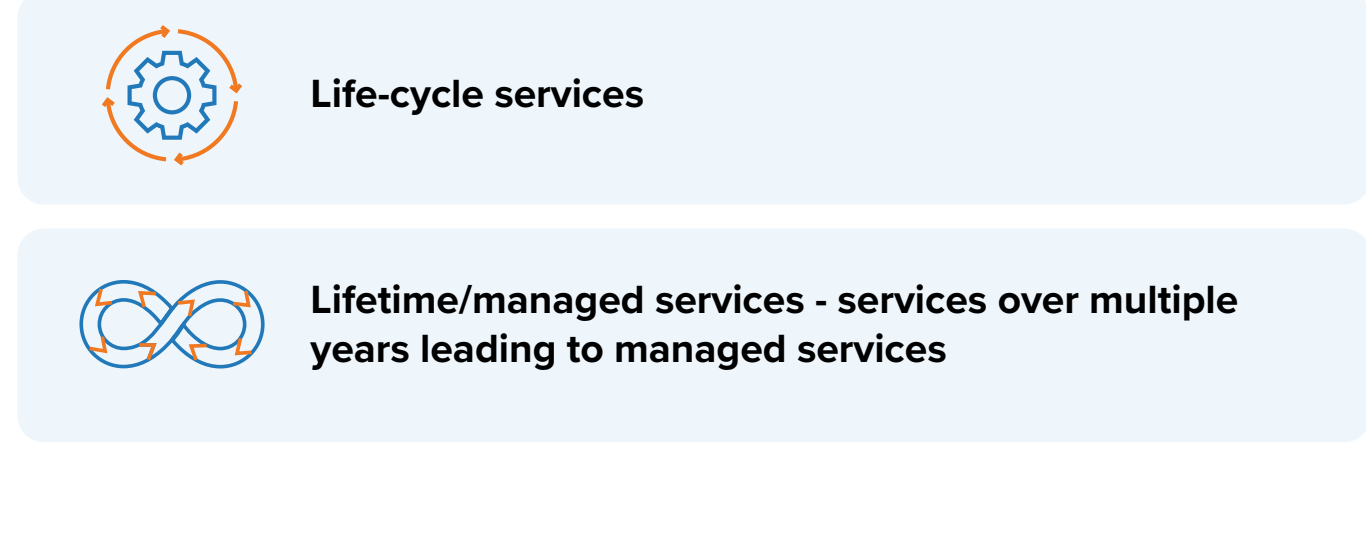
VMware Partners Benefit from Strong VMware Ecosystem Growth



Source: IDC VMware Partner Footprint Model, April 2021

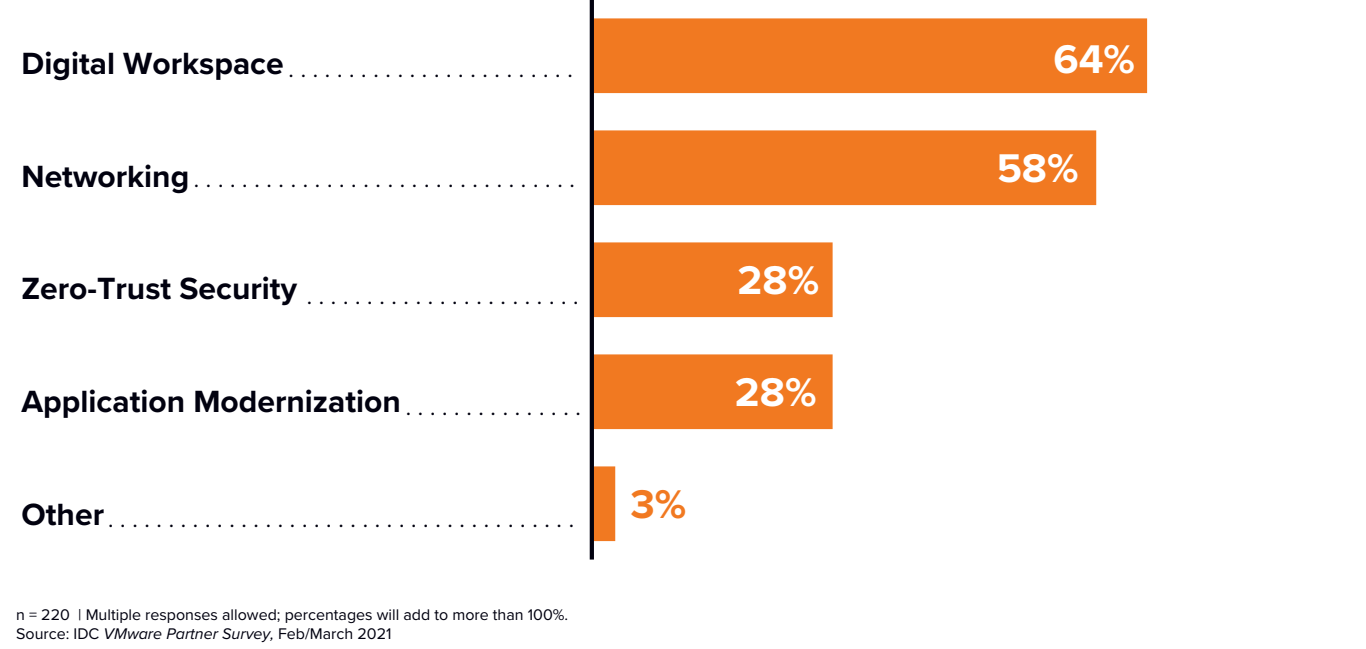
Multiple Paths to Accelerated Growth for VMware Partners

There are opportunities for larger multiplier ratios:



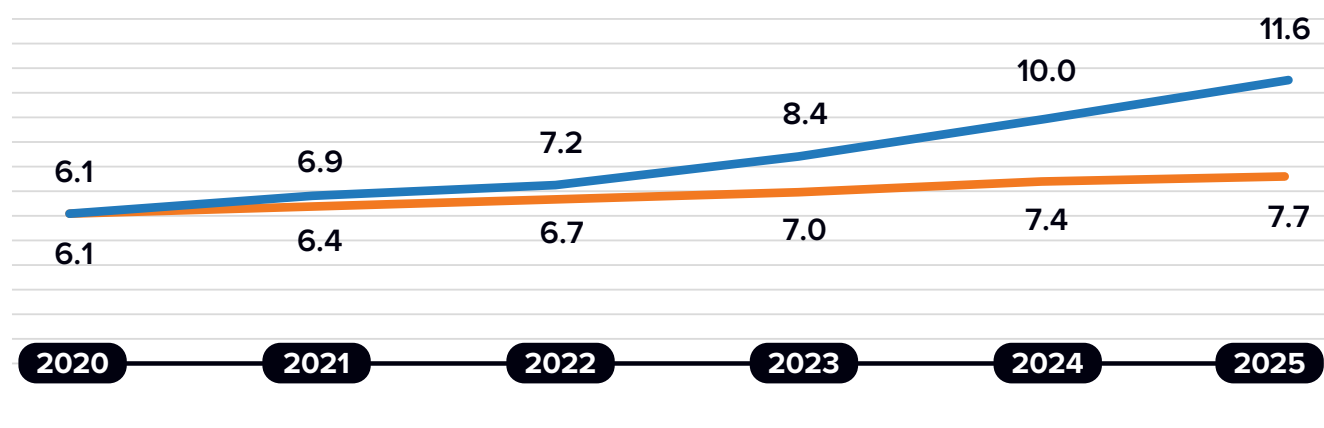
Partner VMware Solution Involvement

Q. Which VMware solutions does your company resell or recommend to your customers?



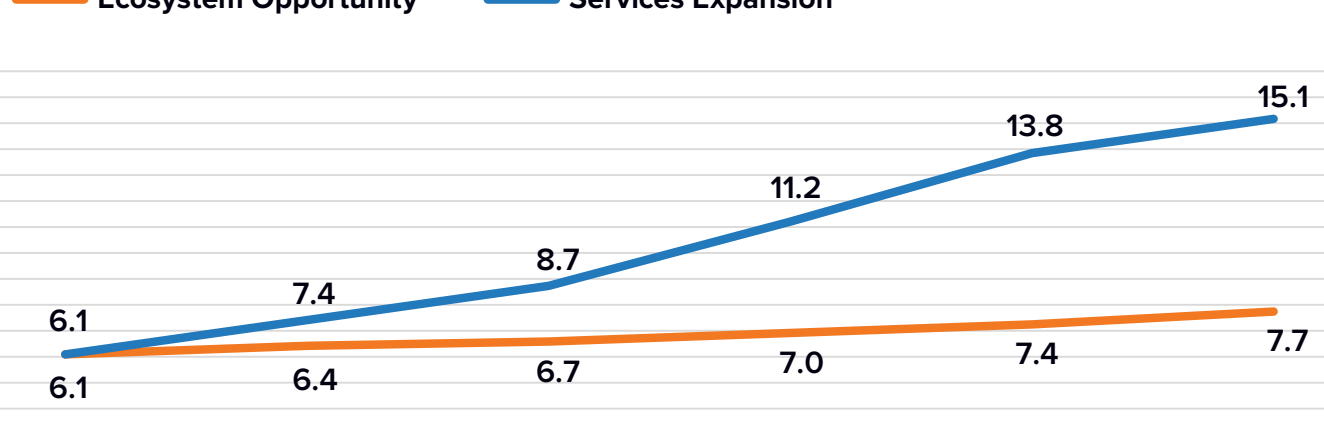
n = 220 | Multiple responses allowed; percentages will add to more than 100%. Source: IDC VMware Partner Survey, Feb/March 2021

The Partner Journey: Adding VMware Solutions (Multiple of VMware revenues)



Source: IDC VMware Partner Footprint Model, April 2021

The Partner Journey: Services Expansion (Multiple of VMware revenues)



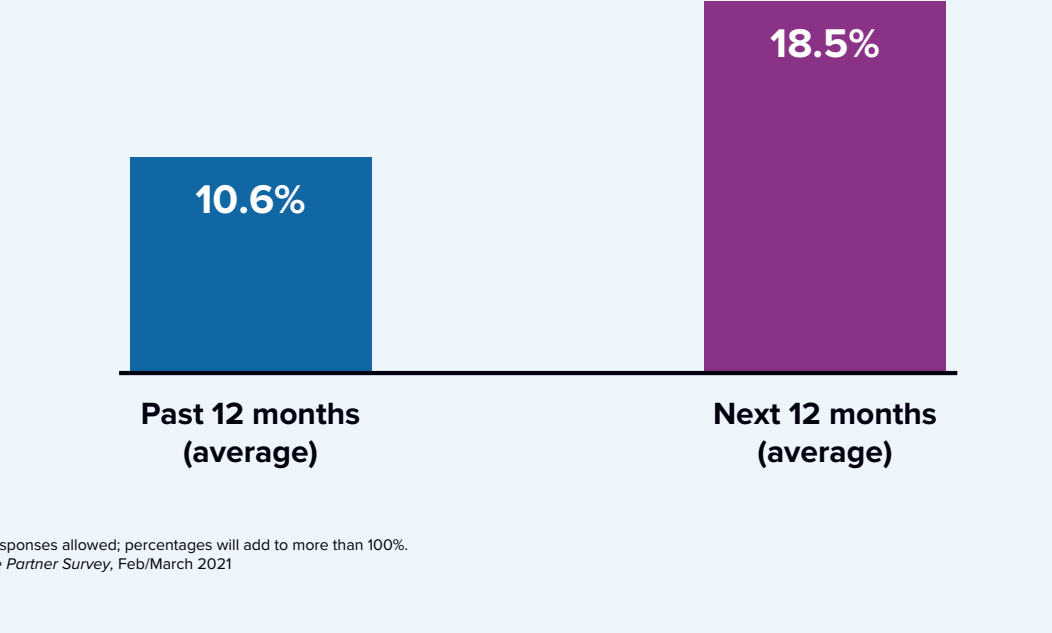
Note: Numbers refer to expansion in both life-cycle services and lifetime/managed services. Source: IDC VMware Partner Footprint Model, April 2021

VMware partners engage across multiple solutions, with room for:



Revenue Growth Related to VMware Business

Q. For the proportion of your business related to VMware, what is the revenue growth rate your company achieved over the last 12 months? In the next 12 months?



n = 220 | Multiple responses allowed; percentages will add to more than 100%. Source: IDC VMware Partner Survey, Feb/March 2021

83% of VMware partners position themselves as digital transformation providers

Message from the Sponsor

At VMware, we're committed to helping our partners and customers achieve the full value of our solutions. Our partner-led services enable VMware partners to become trusted advisors, guiding our customers into a new era of SaaS-based business models.

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