WHAT'S ON ISVs' MINDS?

As they embark on their cloud journeys, European ISVs face complex decisions as they decide what strategy is right for them. Their most popular cloud strategies are:

- **Redevelop as SaaS/cloud native**: 20%
- **Cloud hosted ("lift and shift")**: 35%
- **Security**: 53%
- **Availability of a cloud marketplace**: 37%
- **Market readiness support and business planning**: 37%
- **Deploy hybrid strategy**: 15%

WHY ARE CLOUD MARKETPLACES SO IMPORTANT?

They are the number 1 route to market for ISVs in Europe. Currently, 86% of European ISVs are selling their software on one or more cloud marketplaces. Those cloud marketplaces:

- Drive 36% of European ISVs' software revenue
- Generate 40% of leads for their software offerings

NOW IS THE TIME TO ACT.

CLOUD PLATFORM VALUE PROPOSITION TO ISVs

With IT buyers' growing cloud adoption, ISVs need to navigate and accelerate their own cloud journeys. This is a large opportunity for platform providers, but successful engagement needs a differentiated partnering and recruitment strategy to cut through the noise and gain ISVs' mindshare.

Understand the European ISV ecosystem, its scope, diversity, and challenges

- **1. IDENTIFY**
  - Segment the landscape and define a differentiated platform proposition
- **2. ATTRACT**
  - Define a compelling value proposition addressing ISVs' user requirements
  - Understand key triggers, pain points, and priorities to enable a targeted approach
- **3. DEVELOP**
  - Develop and execute an ISV ecosystem strategy that delivers a joint value proposition
  - Support ISV engagement, drive efficiencies, and offer an attractive path

CLOUD PLATFORM VALUE PROPOSITION TO ISVs

For further information, contact:

- Sources:
  - IDC European Cloud Marketplace Directory
  - The European ISV Landscape: Results from IDC's European ISV Survey, 2020
  - European IT Buyer Sentiment Survey — Wave 4, May 4 — 11, 2020; n = 736

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The VALUE OF CLOUD MARKETPLACES

Why are cloud marketplaces so important? They are the number 1 route to market for ISVs in Europe.

Cloud has a critical role to play in digital transformation and has revolutionized IT. Building a strong cloud business is critical to any software company, but:

- 42% of European ISVs still have on-prem applications
- 93% of those ISVs with on-prem applications are transitioning to the cloud, creating a significant opportunity for cloud providers to sell to, through and with ISVs.
- 77% of European ISVs will use more cloud applications.
- 85% of European organizations expect increased demand for cloud software as they look to leverage new technologies and change the working models in their organizations in response to COVID-19.

For many ISVs, COVID-19 may accelerate pressure to modernize to the cloud as their customers demand it. For your ISVs, COVID-19 will accelerate pressure to modernize to the cloud as their customers demand it. For your ISVs, COVID-19 will accelerate pressure to modernize to the cloud as their customers demand it.