

THE MICROSOFT DIGITAL TRANSFORMATION SERIES

Part 5: Transforming Products

Embracing the breadth and value of partner IP

An IDC eBook, Sponsored by Microsoft



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Introduction

The Microsoft Digital Transformation series is a collection of five eBooks outlining the business opportunity to build or accelerate your digital transformation practice.

Learn how Microsoft partners have developed cloud technologies to evolve their digital transformation practices and deliver innovative services and solutions to customers. Understand how Microsoft's digital transformation pillars are your roadmap to align solutions and customer transformation needs.



eBook #1: The Digital Transformation Opportunity

Gain insight into the opportunity and size of the rapidly growing digital transformation market, the digital maturity of your end-customers, and the business attributes for success. Align your business strategy to the digital transformation market opportunity.



eBook #2: Engaging Customers

Understand how partners are engaging customers across the transformation lifecycle and integrating customer centricity across the business and through data driven insights. Align your customer engagement strategy to help customers succeed on their digital journey.



eBook #3: Empowering Employees

Learn what partners are doing to recruit, train, and develop digital-savvy skills across their organizations. Understand how partners are building modern work environments with self-service and simplified processes leveraging data and insights to aid decision making.



eBook #4: Optimizing Operations

See how partners are transforming their operations to be more adaptive, agile, and efficient by harnessing technology and digital platforms. Identify where and how you can make improvements to your business through automated processes and governance.



eBook #5: Transforming Products

Learn how partners develop and capitalize on their products and owned intellectual property (IP), leverage data to enter new markets, revise business models to prioritize agility, and make customers their business partners on the joint digital journey. Understand the breadth and value of owned IP, and where your strategy should align.

According to IDC, **by 2019**, all digitally transformed organizations will generate **at Least 45% of their revenue** from “Future of Commerce” business models.

Transforming Your Offerings

Cloud technologies and data analytics can transform not only how you sell but also what you sell.

In today's hyper-competitive market, and with the emergence of complex digital technologies, partners can optimize for success by developing solution sales that provide unique value to customers. Partners are embedding intelligent technology into products and services to deliver more value and using data as a strategic asset to enter new markets.

Developing and leveraging your company's own intellectual property (IP) can differentiate your ability to meet customer requirements with focused offerings. Invest in increasing the ratio of IP in your solutions, to generate increased revenue and profitability.

Although your company's value is multi-faceted, a big area of focus for you and your peers is the development of finished solutions. These solutions can be integrated with everything you create and sell, from managed services to repeatable project services and packaged software. You can also apply them across activities such as software development, services development, provisioning, and delivery, and outcomes such as packaged or custom software, and repeatable services.

Market differentiation drives increased profit opportunities by connecting your deep knowledge of your customer's business, with your expertise in vertical industries (e.g., financial services, healthcare) and horizontal functional areas (e.g., marketing, human resources). It is crucial to identify the right IP – by aligning your development strategy and goals to trends in the market and market opportunity. This in turn is leading to new value creation and growth opportunities in a quickly expanding digital market.



Although your company's value is multi-faceted, a big area of focus for you and your peers is the development of finished solutions.

““ When we develop a repeatable motion we're more capable of delivering fixed fee projects that we can take margin on and that doesn't change the business dynamic for the customer. ””

— Jeff Tench, CEO, New Signature

Three key market trends that are helping shape IP development among the partner ecosystem include:

1. Digital platforms/ecosystems. By 2020, 60% of all enterprises will have fully articulated an organization-wide digital platform strategy and will be in the process of implementing that strategy as the new IT core for competing in the digital economy.

Opportunity: Your consulting and professional services capabilities will play a key role in defining and executing on customer roadmaps for digital transformation.

2. Cloud. By 2021, spending on cloud services and cloud-enabling hardware, software and services will more than double to over \$530 billion, leveraging the diversifying cloud environment that is 20% at the edge, and over 90% multi-cloud.

Opportunity: Your cloud and managed services will play a key role in supporting customer cloud initiatives and ongoing integrations with a host of applications.

3. Hyper-agile applications. By 2021, enterprise apps will shift toward hyper-agile architectures, with 80% of application development on cloud platforms (PaaS) using microservices and cloud functions, and over 95% of new microservices deployed in containers.

Opportunity: Your development capabilities will take advantage of customer demand for custom and packaged software.

Differentiating Your Offers

Although partners today offer a range of services, they tend to specialize in a set of core capabilities such as software development, consulting/professional services, or cloud/managed services.

How your business can stand out from your peers is critical, and IP can be the differentiator. With deep specialization and measurable results, you can replicate your solutions to sell into similar scenarios.

Chances are there's code, processes or methodologies involved in what you do. You may not correlate those with your proven capabilities, but that is your IP. Offer something that provides a customer with a better outcome for their business. And protect that offering, to protect others from duplicating it.

Having a specialization, whether by industry or functional department, provides differentiation that optimizes your value and builds your competitive advantage. That, in turn, helps you generate greater margins as a solution leader.

Two great examples of industry and functional department IP development are Microsoft partners KenSci and Staffory. KenSci, which was derived from a University of Washington research project, developed a vertically integrated machine learning platform for healthcare providers. This Azure-based risk prediction platform helps healthcare service providers use data and machine learning to uncover clinical, operational, and financial risks to improve patient intervention and care, improve health system cost management, and increase operational efficiency.

In a similar fashion, Staffory developed an AI robot recruiter for human resources organizations called Robot Vera. According to Staffory, their solution can find qualified candidates 10 times faster than a human and can interview 1,500 candidates in nine hours. Using speech recognition technology, Robot Vera can select and schedule candidates, and hold video interviews with the top candidates.

Microsoft's CEO, Satya Nadella, has said that every business needs to be a software business. That doesn't mean that you must have packaged software, but you do need to think about ways in which IP helps you to differentiate. The creation of meaningful IP does not have to be in the form of a tangible product; at its simplest it can be how you add value.

Having a specialization, whether by industry or functional department, provides differentiation that optimizes your value.

A Microsoft partner like New Signature demonstrates this through its commitment to a digital strategy that includes IP. New Signature has invested heavily in the creation of a cloud management portal to provide their customers with visibility into their project and managed services for monitoring the health of the customer's cloud environment.

The offerings you develop do not have to be something that closes a usability gap in another vendor's product – although that can be a temporary measure. But complementing those vendor technologies and platforms makes sense. In the case of New Signature, that takes the form of tools that utilize machine learning to help customers with Azure management, governance, and capacity planning.

You can also leverage the presales cycle – or in some cases a triage scenario of evaluating workloads and prioritizing them for the transition to public cloud and beyond to full digital transformation of the customer business. This can be a very well defined, discrete motion that is essentially engagement level IP. It's repeatable.

In the case of New Signature, they created a consulting approach using IoT and advanced analytics called "Six Weeks to Insight" focused exclusively on the manufacturing and construction verticals. One attribute of digital transformation is an accelerated amount of data, which allows New Signature to help customers tackle the big data problem in verticals.

Digital transformation expands opportunities for your business and this includes growth through solution development and differentiation. Cloud is the foundation of digital transformation and once customers start that transition it brings an examination of everything that they're doing. It's this complexity that drives the opportunity.

Your value in this environment could be in helping customers think through their problems, and then creating an approach to think differently about what their business could look like. This is foundational work because most customers can't move towards digital transformation without successfully adopting and integrating cloud technology into their business. It's a margin expansion opportunity that includes incorporating those things that you can do again and again on a repeatable basis.



“The business outcome that the customer is trying to achieve is our barometer of success, as opposed to simply the deployment of technology.”

— Jeff Tench, CEO, New Signature

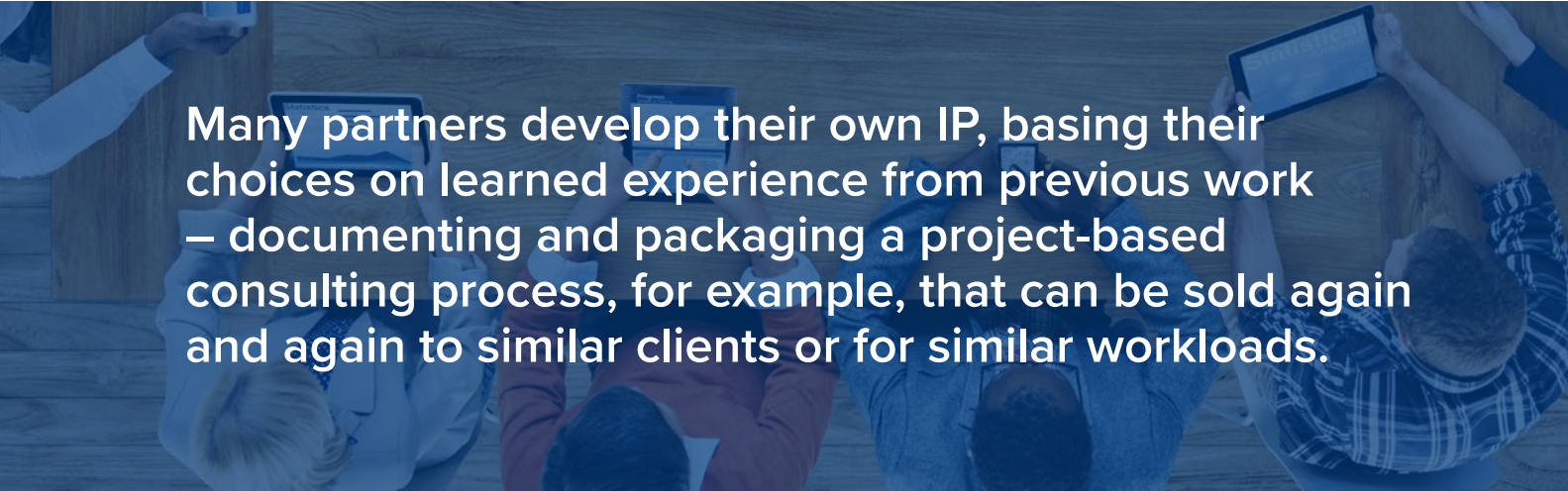
IP Development Considerations

When considering IP development, your choices are to develop it yourself based on in-house expertise, purchase a company that has already developed some or all of the expertise, or partner with another company.

Many partners develop their own, basing their choices on learned experience from previous work – documenting and packaging a project-based consulting process, for example, that can be sold again and again to similar clients or for similar workloads. Consider things you do that can be developed into a repeatable motion, and leverage those as billable services, or as part of a greater pre-sales, delivery, or on-going support solution.

Microsoft partner 10th Magnitude has seized on the trend of digital transformation within its customer base and developed IP to support it. The partner has created a suite of digital transformation assessment and planning tools called TenView.

TenView was adapted from the dev-ops philosophies that 10th Magnitude had been teaching their customers, which they subsequently iterated into a packaged solution. By providing a repeatable service to help customers understand the economic value of upgrading to modernized applications and cloud services, along with understanding migration plans and roadmaps, 10th Magnitude is helping to secure its future by helping customers on their digital journey.



Many partners develop their own IP, basing their choices on learned experience from previous work – documenting and packaging a project-based consulting process, for example, that can be sold again and again to similar clients or for similar workloads.

This was an important strategic decision for a partner that derives 80% of its revenue from professional services. But 10th Magnitude doesn't charge separately for TenView; instead, it's embedded in the cost of its strategy and planning engagements and is included in the majority of the partner's new customer engagements.

Engagements with customers that can utilize IP such as TenView can provide you with a roadmap to further engage with customers to assess, enhance and build out their requirements, and then deliver against those opportunities. It helps drive recurring and additional follow-on projects that are based on the outcomes of that original engagement, and around the transformational opportunity.


Think of your customers as a window into your finished offering development, either as advisors based on their requirements, or as a partner with growth opportunities. The latter is an approach that Hitachi Consulting takes with select clients.

Hitachi Consulting is the consulting arm of the Hitachi Group, a \$90 billion global enterprise. The consulting organization is the spearhead into the market for the larger company, with a focus on industry IoT solutions that combine IP with platforms like Azure. An interesting strategy for the company is co-creation of solutions with customers.

Where there is a fit, within a specific customer with a specific industry issue, Hitachi Consulting invests financial and personnel resources to build a solution with that customer. The company ultimately retains the solution created, including the rights to sell it elsewhere within that industry. The customer benefits from a heavily subsidized solution to a key business issue.

This is a different partnership model that may have a higher initial cost of sale, but if you make the right investment by building the right solution in a co-creation scenario, you can create some profitable opportunities. Like Hitachi Consulting, you'd make the investment once to build something you know has end-customer utility. Then package that as standalone or customizable IP, which you can sell to other customers.

Think of your customers as a window into your finished offering development, either as advisors based on their requirements, or as a partner with growth opportunities.



“ We automate as much as we can with repeatable processes out of an engagement. One of our objectives is to get to as automated and rapid a process as possible. ”

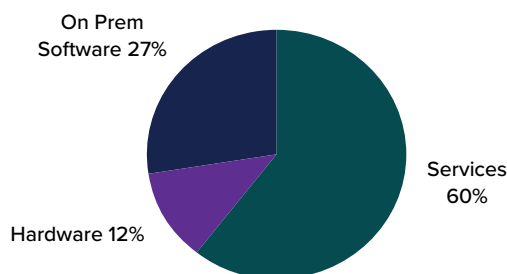
— Alex Brown, CEO, 10th Magnitude

The Services Ecosystem

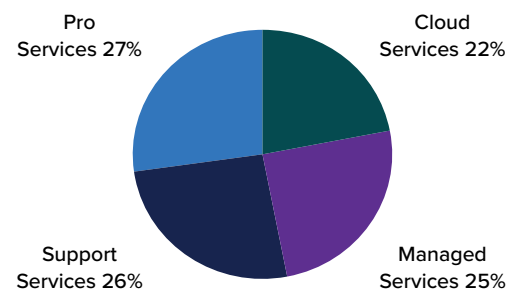
Development of custom and packaged software, and an increased focus on project and recurring managed services, are leading to new value creation and growth opportunities in a quickly expanding digital market.

In IDC's global partner survey, data points to an ecosystem where, on average, the majority of partner revenue being generated is led by services. This means that services are driving the customer engagement and profitability opportunity, more so than specific technologies. Your services are leading your sales, and in the ecosystem as a whole, services are equally distributed in this capacity across managed/cloud services, consulting/professional services, and support services.

Partner Sales-Led Ratios



Partner Services-Led Ratios



Microsoft partner Emit leads with both its managed and professional services, with recurring revenue representing 60% of their business. The company is a good example of a partner that is helping secure the cloud foundation for customers on which to build their businesses. Their managed services model enables them to gain insight into customer issues that they then use to develop solutions to optimize customer requirements.

As a partner with managed services capabilities, it's important to evolve your available services to meet the needs of customers, from help desk to firewall-as-a-service, disaster recovery, and business continuity-as-a-service. But a key feature to effective managed services is to provide dynamic and active reporting. Because a lot of managed services occur in the background, customers are not always aware of the value delivered, so generating visual reports to demonstrate the deliverables and substantiate the fees is important to reinforce the value of services.

Emit supports its managed services with Power BI-integrated reporting capabilities that include third-party vendors, as well as a solution for reporting from the POS system of retail customers. This model to IP development is effective as it starts with an offering that makes sense to your business and that resonates with your customers. Once you've mastered it, you can identify other tangential areas that add value. Implementing a step-wise approach helps you focus and optimize metrics before moving on.



“Everything is as-a-service now and that’s where we get the most profit.”

— Eamon Moore, Founder & managing Director, Emit

Transformed Partners Invest in IP

IDC's global partner survey indicates that partners who have digitally transformed expect double-digit growth (27%) in their revenue related to their IP (i.e., packaged software, managed/cloud services, consulting/pro services, support services) in the next two years, versus traditional partners who have not begun their own digital transformation, who expect 6% IP revenue growth.

As digital transformation drives the strategic agenda for partners, the ecosystem will continue to focus on IP. As an example, digitally mature partners have a much higher rate of investment in IP development. A majority (61%) are investing 10% or higher of their revenue in IP, compared with only a small minority - 16% - of traditional partners. In addition, 69% of digitally mature partners report making major investments in developing packaged software versus 9% of traditional partners, and in developing their own services (85% vs. 36% respectively).



Digitally mature partners have a much higher rate of investment in IP development. A majority (61%) are investing 10% or higher of their revenue in IP, compared with only a small minority - 16% - of traditional partners.

Optimizing Gross Margin

IDC research also shows that partners with digitally mature businesses outperform other partners when it comes to profitability.

Their focus on differentiating their service offerings and developing their own IP helps drive this, as they can use those profits to invest in themselves and evolve their solutions to add more customer value and continue their path of growth.

Gross margin is a good indicator of the value of your own finished solutions. Your highest gross margin comes from IP-related activities, especially managed services and packaged software.

In the profit hierarchy, these finished solutions yield the highest profits, with upwards of 70%+ gross margin. Not far behind is managed services (perhaps the epitome of repeatable processes) at 40%+. More important, however, is that these types of solution offerings help you deliver customer lifetime value and provide ongoing insight that allows you to identify further areas of opportunity.

Most, if not all, of your revenue comes from other activities that extend beyond reselling a vendor's product or service. In fact, IDC survey data indicates on average 64% of total partner revenue comes from non-resale activities: 38% cloud/managed services, 23% support services, 20% consulting and professional services, and 19% packaged or custom software.

If you're just starting to identify solution areas, consider focusing on a specific industry problem where you can build value for customers, either as a process, service or product on top of a platform like Azure. Leverage your understanding of your clients and the problems they're trying to solve in their businesses and integrate that value into your delivered services.



“The shift we’ve made is to move away from selling people’s time to selling outcomes through our own IP embedded with leading platforms.”

— Itay Inbar, SVP, Hitachi Consulting

“ If you build a solution based on what the customer needs, that gives you longevity. It’s investing in being relevant. ”

— Itay Inbar, SVP, Hitachi Consulting

The IP Experience

It's worth considering that you may be sitting on a treasure trove of IP that was previously customized for specific clients. There may be value there that can be leveraged for other clients, which requires minimal effort compared to inventing something anew. What you're ultimately moving towards is faster delivery of repeatable value, which will drive higher profitability.

In fact, you may not even charge for these services as a line item in a customer invoice. If it's packaged software, there's a discrete fee, but in many cases, it may be something less tangible, like a methodology or process. The fee to the customer in those cases may be around your overall delivery of a total solution, with the methodology or process being one part of the whole.

Creating repeatable processes and/or packaged software can be a very successful strategy, but it must be done in a deliberate and iterative way. The advent of digital technologies provides many new areas for you to expand your business. However, it's more effective to first identify one area that makes sense for your business and your customers. From there you can run a pilot, measure the results, and make any refinements required before scaling it out.

One of the big hurdles in your development journey is understanding what's repeatable from custom project work, and packaging that up as a repeatable process or methodology, or as a packaged software product. This must be a strategic decision within the company – it can't be an ad hoc process as this can add time and money that may not occur in a more structured approach.



Creating repeatable processes and/or packaged software can be a very successful strategy, but it must be done in a deliberate and iterative way.

Even if you're reticent about developing your own IP, there are partnering opportunities to help you along the way. Microsoft partner BitTitan developed an offering that runs on Azure called MSPComplete – an IT services automation platform for partners offering managed services.

MSPComplete allows partners to standardize and benchmark their managed services capabilities. As partners move to greater automation using MSPComplete, they can focus on solving more complex problems and designing processes to solve them.

In providing managed services, your value is your operating procedures. Effectively repeating and scaling those procedures is what drives success and can be a challenge for many partners. Customer experience is also essential, as meeting strict SLAs is crucial to continued business. Using MSPComplete can help partners refine execution with repeatability, scalability, and automation.

This is an evolution for partners, transitioning from managed email to multi-workloads, and then to include devices and multi-cloud ecosystems. This is complex, which is why automation, standardization, repeatability, and scalability are essential to driving the market opportunity.

Managed services are similar to the overall packaged solution development process in that it makes sense to start with a select area, such as Office 365. Once you become familiar with standard capabilities, you can start to customize and deliver complementary services. From there you can move to other areas (e.g., Azure, Dynamics), all the while making it unique to your solution offerings.



In providing managed services, your value is your operating procedures.

Packaged Software and Accelerators

Rather than repeatable methodologies or processes, your goal may be to develop packaged software, which today is based on the software-as-a-service (SaaS) model. Microsoft partner Awingu identified a key point in the customer digital transformation journey – the move to cloud and all that the cloud entails around security.

Awingu developed a unified workspace solution that allows users access to all files and applications via a Web browser. It essentially enables and accelerates the move to cloud and opens up new vistas for clients around the benefits of a full cloud experience.

Awingu is a five-year-old, born-in-the-cloud company that established a presence early on Azure Marketplace. This was an important strategic decision, and one that product and services partners need to consider as an IP accelerator. Marketplaces have grown over the last number of years from being nice-to-have marketing vehicles for partners to providing invaluable access to a captive audience of potential customers that share something in common (e.g., Azure).

Microsoft partner Hanu also embraced Azure and its Marketplace, developing expertise and a pool of talent around it, and managing the environment for customers. Using their expertise relative to a security and governance framework, their governance app for the financial industry has been on Marketplace for years and has worked well as a lead generator.

For customers, the Hanu solution means that rules and guidelines are automatically in place for specific tasks they may want to initiate in the cloud, such as a mobile loyalty program launched by a marketing department. Hanu compares its solution to the work that happens before a building is erected – you first need the architectural diagrams before an actual building can take physical form. In public cloud the governance and controls are what allow the customer to move forward with doing what they need to do to run the business on a cloud foundation.

“We see a huge shift to cloud and having a presence in the Azure Marketplace is accelerating this move.”

— Walter Van Uytven, CEO, Awingu

This, along with IP around cloud spend optimization, was something Hanu developed out of necessity so customers could manage and control their cloud consumption. Without it, customers may be too reticent about moving to the next step in the cloud and digital transformation journey, which prevents the partner from adding more value to the business. Removing obstacles to cloud adoption paves the way for deeper transformation.

“It’s our full range of services around Azure that puts us in a unique position.”

– Anil Singh,
Founder and
CEO, Hanu

Like many partners, Hanu provides managed services, project services, and development work. This is part of the new world of digital transformation where one partner may do cloud assessments and migrations, provide the enablement and management, and develop functionality in areas where Azure provides the foundation.

Hanu delivers digital transformation in the form of app migrations, but also in managing the environment to create stickiness in the account. More importantly, however, is that managing the environment gives the partner the pulse of what’s going on in the account, providing the visibility and insight to move them to the next stage of value.

Many partners are gravitating to Azure as a platform for innovation. In fact, Hanu likes to call what they do “innovation-as-a-service”. Instead of proofs of concept, they deliver ‘proofs of value’. This is particularly relevant to digital transformation and transitioning customers to innovative technologies such as big data, machine learning, artificial intelligence, and IoT.

Your opportunity has never been greater to evolve and continually differentiate your products and services and discover new ways of extracting value. Your peers, your competitors – and even your customers – are investing now in the transformation of their products and services.

Differentiating your solutions is a continuous effort in the modern digital world. Your agility, innovation, and investment will surface the repeatable motions that add value, including the development of your own IP. Whether its new customized SaaS offerings or your unique delivery methodology, your technology and processes can unlock your highest gross margins.

Your growth opportunities in a transforming market are much greater when your services define your IP and your customer engagement points the way to more value and further refinement of those services with intelligent technologies, automation, and data analytics. In the digital world, your solution offerings become the embodiment of customer value. They change with customer needs and your ability to deliver against those evolving needs will further feed your IP.

Recommendations

In today's hyper-competitive market, and with the emergence of complex digital technologies, the success of your business is defined more and more by its unique solution offerings. It's important to understand the value of differentiation, but at the same time work towards identifying and capitalizing on the right IP. Several key recommendations specific to developing your offerings include the following:

- 1. Identify solutions that fits with your business model**
Deliver market differentiation and increased profit that aligns with the intimate knowledge you have of your customers' business, whether that's from industry (e.g., financial services, healthcare, etc.) or functional department (e.g., marketing, human resources, etc.) expertise.
- 2. Understand the market trends that are driving your strategy**
Gravitate to solution areas that align to market opportunity, whether that's specific to digital platforms, cloud, or hyper-agile applications. This is a key step in ensuring that your IP focus will have relevance and an accelerated ramp to revenue.
- 3. Think about IP as a differentiator**
Your finished solutions should be developed and marketed as a differentiator in the market. This means identifying areas of customer pain that can be addressed with a repeatable process, methodology, or product. This can elevate customer discussions beyond price and provide higher margin scenarios.
- 4. Use a step-wise approach to develop an offering**
Approach the development of your offering in a proactive, strategic way. This is a top-down decision that will require funding and resources. Pick one area of focus, rather than many, to minimize the overall burden. Once an offering is identified, consider piloting prior to scaling to ensure it's ready to be used repeatedly.

The Microsoft Digital Transformation Series

This eBook is one in a series of five that will be published throughout 2018. Each eBook seeks to explore the digital maturing of the partner ecosystem relative to partners' ability to address the digital requirements of their customers. In addition, the eBooks examine how partners work with Microsoft to address key attributes aligned to the digital transformation pillars.



eBook 1: The Digital Transformation Opportunity



eBook 2: Engaging Customers



eBook 3: Empowering Employees



eBook 4: Optimizing Operations



eBook 5: Transforming Products

Research Methodology

The content in this eBook series was developed through a combination of 16 in-depth interviews with forward-thinking Microsoft partners, and a survey of 600 partners worldwide. The goal of the research is to understand the partner view of the digital transformation opportunity, and the steps they're taking to position themselves for success with their customers. For more complete description of the methodology please refer to the Appendix in eBook 1 [found here](#).

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