



IDC Content Usage Guidelines

IDC encourages the use of its data and market intelligence for both internal planning and external communications purposes. However, because IDC information is copyright protected, all external uses of IDC content must have IDC's prior and express written permission. External usage covers sublicensing, leasing, selling, or offering for sale IDC content, as well as any public display of IDC information, including but not limited to:

- Advertisements, including Web-based ads
- External presentations, proposals, and reports
- Press releases and media alerts
- Promotional materials and marketing collateral
- Web pages, blog and social media postings, and other online services

IDC information may not be reproduced, excerpted, reformatted, translated, otherwise repurposed, or distributed to any non-employees of your company (including suppliers, affiliates, partners, contractors, investors, customers, or reporters) without written permission from IDC. These actions constitute a violation of IDC's copyright and can result in legal action.

To help clients maximize the value of IDC's global market intelligence and advice, and to ensure that any IDC information used is accurate, current, properly sourced, and placed in a suitable context, IDC has created the following guidelines for obtaining permission to use IDC content and analyst quotes. Please note that additional guidelines are available for specific IDC products, including Trackers, Multi-Client Studies, IDC MarketScape reports, IDC Innovators, and Logo Award Programs.

If you have any questions regarding these guidelines, please email permissions@idc.com or call IDC's Permissions team at 508.935.4268 (inside the United States), or contact your local IDC country manager. You may also contact your IDC Go-to-Market Services engagement manager if your request pertains to a custom engagement sponsored by your company.

General IDC Content Usage Standards:

- **WHAT CAN BE USED EXTERNALLY:** The content to be used must have been published by IDC in a research document available on IDC.com, in an **IDC White Paper** or **Multi-Client Study**, or in a quarterly IDC data product (**Trackers**, **QViews**, etc.).
- **AGE OF DATA:** The content to be used must have been published by IDC **within the last 18 months**. Forecast and market-share data must come from the most recently published updates. (Some exceptions are made to this standard. For more details, please contact permissions@idc.com.)
- **SOURCING:** All IDC information used must be properly sourced in the client's content asset. The standard format for IDC source information is: IDC, Title of Document, Doc #xxxxxx, month year. For **IDC White Papers**, **InfoBriefs**, **Infographics** and **eBooks**, the source must include the name of the sponsor, as follows: IDC White Paper (or IDC InfoBrief, IDC Infographic or IDC eBook) sponsored by Vendor X, Title of White Paper, Doc #xxxxxx, month year.
- **VERBATIM QUOTING ONLY:** Excerpts of IDC content must be taken verbatim from an IDC source and must be used in a context that does not alter or distort the excerpt's original meaning. Excerpts longer than a few sentences may require separate licensing fees. No paraphrasing will be allowed.
- **DIRECT VENDOR COMPARISONS:** Client content assets, including press releases, marketing documents, blogs and other Web postings, and advertisements containing direct comparative

information about competitors will be carefully scrutinized for accuracy and context, and may be refused. Comparative information derived from custom projects, inquiry, or other activities outside the standard program published deliverables on behalf of all program clients will not be approved for external use or distribution.

- **COMBINING IDC DATA FROM DIFFERENT DOCUMENTS:** Combining IDC data from separate forecasts will receive close examination and will likely be refused.
- **CALCULATIONS BASED ON IDC DATA:** Calculations based on IDC data will receive particularly close examination and will likely be refused.
- **IDC TAXONOMY:** Market data must be represented within IDC's market segmentation. Markets and sub-markets that are not recognized in IDC's market taxonomy will not be approved. No special or custom market segmentations are permitted.
- **MARKET RANKINGS AND LEADERSHIP CLAIMS:** Market leadership and ranking claims can only be made on the following products – market share reports and tracker/Qview results. Leadership claims such as "a leader, a major player, a contender" may be made in relation to an IDC MarketScape report as published.
- **VENDOR MARKET SHARE:** Only the top 3 or top 5 vendors can be used when showing comparative market share in an external (public) document. Head-to-head comparisons with an individual competitor are strongly discouraged and will likely be rejected. **Competitor company names may be used in the following regions – Worldwide, USA and Canada. Competitor names cannot be used in EMEA, Latin America, Japan and Asia/Pacific -- competitors must be identified as Vendor A, Vendor B, Vendor C etc.** Competitive market share at the country level requires prior approval from the analyst and a research vice president.
- **IDC PRODUCTSCAPES:** No recognition, ranking, top marks or score rankings can be made based on the results of an IDC ProductScape. IDC does not allow PR focused on IDC ProductScape results. Vendors who are clients of the program the IDC ProductScape is published under may quote from their vendor slide. The use of slides from an IDC ProductScape requires the purchase of an excerpt and that excerpt must be used in full. Slides may not be pulled from the excerpt and used individually. No mentions of competitors' results or names will be allowed. Capability bubble charts are not any kind of ranking or scoring. They represent whether or not a company has fully, partially etc. those specific capabilities in their products.
- **EMAIL SUBJECT LINES:** The use of "IDC" in the subject line of a client or third-party email is not permitted.

Press Releases

- IDC **does not** approve press releases whose sole focus is to announce that a vendor or product has been mentioned or profiled in an IDC report or white paper. In these situations, references to the IDC "mention" or profile should be used in a press release whose primary focus is some other announcement (i.e., a product launch, an event, a client win, etc.). Accordingly, the IDC information should be used to support the vendor's primary messaging in that press release.
- IDC **does** approve press releases whose primary focus is to announce a vendor's market results or position in the following types of IDC reports: **IDC Trackers; Market Share reports; IDC MarketScape reports; Thought Leadership (vendor neutral) white papers; and IDC Award programs, such as IDC Innovators.** Separate content usage guidelines exist for each of these report types and are available from IDC on request.
- To avoid the appearance of a joint press release, the use of IDC's corporate boilerplate content in client press releases is not permitted without the prior approval of IDC's corporate communications team.

- The use of "IDC" in the headline and sub-headline(s) of press releases is not permitted. The only exception to this rule is a MarketScape press release. Acceptable alternatives include "Leading Analyst Firm," "Market Research Firm," etc.
- The preferred descriptions of IDC in the body of a press release are as follows:
IDC, a leading provider of global IT research and advice,...
Leading IT market research and advisory firm IDC...

Analyst Quotes

- Analyst quotes must be accurate, objective, complete, and relevant to IDC's most recent data, analysis, and opinion.
- In situations when the quote is derived from an IDC research document, the quote attributed to an IDC analyst should be used in full context so that the meaning is not misconstrued.
- The quote should address market needs, customer requirements, or technology developments in the analyst's area of expertise.
- The quote will not promote a company or a product, as this is the role of the client spokesperson. Similarly, negative or cautionary comments regarding a particular vendor cannot be leveraged by a competitor in any form.
- An IDC analyst's official title must accompany his or her name.
- All analyst quotes must be reviewed and approved by the analyst being quoted. In many cases, the quote must also be reviewed and approved by an IDC vice president. If the quoted analyst is unavailable for review within the client's timeframe, the quote itself will not be approved.

Social Media

- The use of IDC information in Web 2.0 and social media applications, including but not limited to blogs, Facebook, LinkedIn, Twitter, Wikipedia, and YouTube, are subject to the same guidelines outlined in this document. For example, "IDC" may not be used in the names of Facebook pages, LinkedIn Groups, or Twitter handles or hashtags without prior approval by IDC. These uses are always reserved for IDC-led initiatives.
- IDC recognizes that "conversations" between and among individuals and organizations continue to evolve and leverage a growing number of social media platforms. IDC distinguishes between "commenting" on, or "tweeting" about, an IDC deliverable versus "commenting" on, or "tweeting" about, the contents of the deliverable. The latter always requires prior permission from IDC, as with any form of external content use unless the information has been directly released to the public by IDC in the form of a press release or a tweet from the IDC corporate handle @idc or other authorized IDC analyst or representative.
 - For instance, tweeting that IDC's latest server tracker numbers just came out and perhaps linking to an IDC document or press release does not require permission. However, tweeting about the latest server tracker results (e.g., "XYZ vendor is #1!") requires prior permission from IDC unless this information has been directly released to the public as described above. Any use or reference to IDC when establishing a social media presence (e.g., setting up a Facebook page, Blog, Twitter profile, etc.) requires prior approval from IDC.

Figures, Graphics and Logo Slides

- The use of IDC figures and graphics, such as the **IDC MarketScape** graphic, may involve separate licensing fees. For more information, please contact your IDC sales representative or permissions@idc.com.

- Clients using an IDC figure must use it exactly as it appears in the published document. Clients may not display a subset of the vendors or markets shown.
- A figure showing IDC's ranking of market-share position (e.g., #1, #2, etc.) may be allowed by the vice president from the research group that published it. This is the decision of the research group vice president.
- When displaying IDC figures or graphics, the market name may not be changed or modified in any way.
- When displaying IDC figures or graphics, the title describing a figure may not be changed or modified.
- When displaying IDC figures or graphics, the units, columns, rows, axes, labels, legends, etc., may not be changed or modified in any way.
- The following graphics can be used in client presentations **WITHOUT** any additional fees – **IDC DecisionScape** graphics and the **IDC Market Share Executive Graphic**.
- The complete **IDC Market Forecast Executive Graphic** **CAN'T** be used externally. A modified version may be used in a client's presentation that includes the first and last year with totals (no segments) and includes the header (title of graphic) and IDC source.
- The use of the **IDC Market Glance** logo slide is free (with permission from IDC Permissions) to both IDC clients and non-clients. The logo slide may **NOT** be altered in any way. Requests for additional **IDC Market Glance** content will become a custom request and require further fees.
- Graphics generated under the “Views” section of the **IDC Tracker Query Tool** including all charts are for **INTERNAL USE ONLY**.
- IDC graphics can't appear in a client's press release.
- No badges can be created for IDC MarketScape promotion.

Miscellaneous

- Reprints must be produced by IDC or prior written permission must be obtained from IDC for reprinting by a third party. The IDC copyright must be included. For more information about reprints, please contact IDC Sales at sales@idc.com.
- If a client needs approved IDC information translated into different languages, the text to be translated must be sent to IDC for review and approval. If the text is to be translated by IDC analysts, this request must be made at the time of submission of the information for approval. If the text is to be translated by the requestor, then the translated text, in each language for which the client requires approval, must also be included in the translation approval request. This may require up to 10 working days for verification by the relevant IDC local office.
- Non-IDC materials should not mimic any IDC look and feel, or other brand elements.
- Use of the IDC logo is not encouraged in client materials. For a copy of IDC's logo usage guidelines, please contact permissions@idc.com.
- IDC reserves the right in its sole discretion to terminate or modify permission to use, display, or distribute IDC content and may request that third parties modify or delete any use of content that, in IDC's sole judgment, does not comply with these guidelines, or might otherwise impair IDC's rights. IDC further reserves the right to object to unfair uses or misuses of its trademarks or copyright.

Process for Submission:

- To secure permission to use IDC information, clients must submit a complete and final version of the content asset containing the IDC information in order for IDC to gauge the full context of the usage and to ensure its accuracy, currentness, and proper attribution. Content assets are most commonly submitted in a document format (e.g., press release, marketing collateral, presentation, financial filing, Web page, blog entry, Tweet, etc.) but may also be submitted in other multimedia formats, such as audio and video.
- The submission should indicate the source from which the IDC information was taken.
- The request to use IDC information and the content asset in which it is to be used can be sent to permissions@idc.com for review and approval.
- The request to use IDC information will be carefully reviewed for context, accuracy, currentness, and proper attribution by IDC Permissions and the analyst responsible for the original research. Approvals may require additional review by the appropriate IDC research vice president or IDC country manager.
- Most permissions requests are reviewed and approved within 72 hours (2-3 business days). However, a number of factors can delay an approval, including the failure to include source information, the format of the content asset submitted for approval, the need to make extensive changes to the content asset, and the availability of IDC analysts/vice presidents for review and approval. Note that multimedia (e.g., audio, video) review requests may take longer than document-based requests.
- An IDC Permissions approval applies only to the content asset that was submitted for review. IDC does not issue "blanket approvals" for the use of IDC information in any content asset of a client's choosing. Each content asset containing IDC information requires a separate review and approval from IDC. If there are any changes to the content asset after an approval is issued from IDC, the revised content asset must be re-submitted in its entirety for subsequent review and approval.

Questions about IDC's Content Usage Guidelines can be sent to permissions@idc.com