

# IDC Tracker and QView Data Citation Guidelines



To help clients maximize the value of IDC's global market intelligence, 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 and using information from IDC's Quarterly Tracker and QView Products.

These guidelines pertain specifically to IDC's Quarterly Trackers (both regional and worldwide data) and QView products in conjunction with IDC's Term of Use and Content Usage Guidelines (available on request).

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## Guidelines for Data References

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This section provides guidelines for appropriate data references by clients.

- **Data Ownership:** The client must "own" the data being referenced, either through a subscription to the Tracker or QView or through the purchase of current published data. Some exceptions are allowed where IDC has placed a limited amount of data into the public domain via a press release or other public-facing document.
- **Data Version:** The data cited by the client must be from the most recently published Tracker or QView. Requests to cite data from previous versions will be returned to the client to be updated.
- **Technology Market:** Every data reference should clearly state what part of the market is being referenced, (e.g., x86 servers, desktop PCs, network attached storage, etc.). The market reference must conform to IDC's taxonomy, using the specific market name identified in IDC's research.
  - Company-specific terms or market names or categories cannot be used (even if they are synonymous with IDC's taxonomy).
  - Data from multiple categories in the Tracker or QView database may be combined into new categories defined by the vendor, but the new categories must be clearly described and approved by IDC. and it must be clearly stated that this is a combination of IDC categories. Please note that IDC will carefully scrutinize any such combinations to ensure they accurately reflect a true market dynamic.
  - *Examples of possible allowed combinations:* Unix plus Linux shipments; Entry and mid-range servers; SAN plus NAS into networked storage.
  - *Examples of combinations that would not be allowed:* SAN plus internal storage; Shipments to Government and Small Business.

- **Measurement:** Every data reference must clearly state the unit of measurement being used (e.g., vendor revenue, unit shipments, ports, capacity, etc.).
  - If both vendor revenue and value are reported by IDC, only vendor revenue can be used for statements about worldwide market share.
  - When making a statement based on IDC data, the statement must be specific about the unit of measurement. For example, the statement "Company A is #1 in the worldwide x86 server market" should be correctly stated as "Company A is #1 in shipments in the worldwide x86 server market" or "Company A is #1 in the worldwide x86 server market based on unit shipments."
- **Time Period:** Every data reference must clearly state the time period being cited (e.g., Q1 2019, calendar year 2018, Q2 2018 through Q1 2019, etc.).
  - Growth references should also specify whether the measurement is sequential growth (quarter over quarter) or annual growth (year over year). For example, "Company A grew its worldwide x86 server revenues 9.5% year over year in Q1 2019."
  - Companies whose fiscal calendars do not correspond to calendar quarters may want to specify that the reference is to calendar quarter.
- **Margin of Error:** If the difference between two or more companies is within the estimated margin of error for the data, IDC may declare a statistical tie.
  - The margin of error varies depending on the specific market and IDC's confidence in the data. In most cases, a difference of 1% or less in the shipment or revenue market share at the worldwide or regional level will be declared a tie; at the country level, a difference of 2% or less would be declared a tie.
- **Market Position:** The market position (share) for a company must be based on the Tracker field named **Company** and the company name(s) must be stated exactly as they appear in the Tracker (e.g., IBM, Dell Technologies, Hewlett Packard Enterprise, etc.).
  - Statements about market position should carefully distinguish between growth, market share, and market share gains. Growth and market share statements should be expressed as a percentage. Statements about market share leads, gains, or losses should be expressed in percentage points.
  - Examples are as follows:
    - Company A grew 5% sequentially in vendor revenue

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- Company A grew 5% year over year in unit shipments
  - Company A gained 5 points of market share, sequentially
  - Company A lead the market with 25% market share in units, 4 points ahead of Company B.
  - IDC does make exceptions to the naming convention in cases where two companies are operating a joint venture, such as HPE/New H3C Group and Inspur/Inspur Power Systems (IBM).
  - For the HPE/New H3C Group joint venture, which is only in effect in China, statements based on worldwide and PRC data must state the company name as HPE/New H3C Group. For statements that exclude any PRC data, the company name is Hewlett Packard Enterprise.
  - IDC holds the right to add to the exceptions as the market dynamics change.
- **Company Comparisons and References:** Comparisons and references to the Worldwide market data of other companies (competitors), including naming the company, are allowed. However, such statements will be scrutinized for appropriateness and statistical significance.
- IDC reserves the right to deny approval if such statements, or the context in which they are used, are too aggressive. Phrases such as “Company A leads Company B by 2 percentage points in vendor revenue market share” are appropriate, if the difference is deemed by IDC to be accurate and used in an appropriate context.
- **Market Ranking:** Any display of the top-ranking companies in a given market must be shown in rank order based on market revenues or unit shipments. Only the Top 3 or Top 5 companies may be included in any such representation (graphic or table).
- Please note the additional guidelines below about Regional and Country References.
- **Regional and Country References:** Regional and country level data can be cited. However, in some instances, this will require approval from the region or country, which may delay the release.
- For the regions Asia/Pacific, China, Japan, Latin America, and EMEA the name of the vendor may not be used when quoting or showing competitor data. Instead Company A, Company B, Company C etc. must be used.
  - If a statement is based only on regional or country data, the lead analyst in that region/country will be responsible for reviewing the data and

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coordinating the approval process with the corresponding IDC Permissions team.

- If a regional/country team receives a request for approval of a statement based on worldwide data, it should be submitted to [permissions@idc.com](mailto:permissions@idc.com) for review and approval.
  - Before submission, the regional/country teams should review the statement to ensure that it meets the criteria listed in the criteria above and, if needed, request early correction with their local client.
- **Query Tool Graphics:** Graphics generated for the “View” section of the **IDC Tracker Query Tool**, including all Charts, are for **INTERNAL USE ONLY**.

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## Client Press Releases

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This section provides guidelines on the basic format for client press releases utilizing Tracker or QView data.

- IDC may not appear in the headline nor any sub-headlines. References such as “Leading Market Research Firm” and “New Data” are appropriate.
- There cannot be any IDC boilerplate (i.e., About IDC) in the press release. This is a client press release, not a joint release.
- The correct Tracker or QView product and the date of the release must be referenced as a source using the following format:
  - **IDC Quarterly Technology Name Tracker/QView, year & quarter. For example:**
    - **IDC Quarterly Server Tracker, 2019 Q4**
  - A list of all enterprise Tracker names is below:
    - IDC Quarterly Cloud IT Infrastructure Tracker
    - IDC Quarterly Converged Systems Tracker
    - IDC Quarterly Enterprise Client Device Tracker
    - IDC Quarterly Enterprise Infrastructure Tracker
    - IDC Quarterly Enterprise Storage Systems Tracker
    - IDC Quarterly Ethernet Switch Tracker
    - IDC Quarterly Hardcopy Peripherals Tracker
    - IDC Quarterly Purpose-Built Backup Appliance Tracker
    - IDC Quarterly Router Tracker
    - IDC Quarterly Security Appliance Tracker
    - IDC Quarterly Server Tracker

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- IDC Quarterly Wireless LAN Tracker
  - IDC Semiannual Enterprise Storage Systems Tracker Workloads
  - IDC Semiannual Industry Cloud Tracker
  - IDC Semiannual Public Cloud Services Tracker
  - IDC Semiannual Server Tracker Workloads
  - IDC Semiannual Software Tracker
  - IDC Semiannual Telecom Services Tracker
- IDC analysts may not be quoted in the press release. IDC analysts may be quoted in other types of press releases, but not releases about quarterly Tracker or QView data. IDC is happy to allow the use of its data in these releases, but, because of the sometimes very direct vendor comparisons made in these releases, IDC does not wish to be quoted in them.
- If the focus of the client press release is some other subject and includes a mention of recent Tracker results, then an analyst quote can be approved. For example, an IDC analyst can be quoted in a client press release announcing a new product that also mentions recent Tracker results in the narrative of the release. The focus of the press release is the new product announcement, not the Tracker results.
  - We do not allow analyst quotes in which the primary focus of the press release is to announce the client's most recent results in the Tracker.

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## Timing of Client Requests

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- **Timing of requests:** As a general rule, IDC does not approve new requests to cite current Tracker data in marketing materials or press releases in the one week before new Tracker data is published.
- For example, a request to cite Q4 data in a press release or brochure in the last week before Q1 data is to be published will not be approved.
  - In these situations, the client will be instructed to wait until the new data is available and then re-submit the request using the newly published results.
  - The exception to this rule is for data to be used in a contract bid or RFP. Because these requests are urgent, seen by a limited audience, and reference a specific period in time, we can approve these requests in the last week before new Tracker results are published. However, it is

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essential that these requests clearly state the time period, measurement, and market that the data represents.

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## Preliminary Data

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- IDC may occasionally release preliminary market data to its clients. **This data is for internal client use only and may not be used by clients in external press releases or other forms of external communications.**
- IDC may also place a limited amount preliminary data into the public domain via press release (this is standard practice for the Personal Computing Device Tracker). Any preliminary data that IDC place in the public domain may be used by clients in external communications. Prior review and approval is required when citing this data in a public-facing document and the data must be clearly identified as preliminary results.

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## Embargo Policy

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In order to allow clients access to data prior to the public release of the data, IDC may put in place an embargo. IDC will clearly specify the time when the embargo is to be lifted and the data will be made public.

### User guidelines regarding IDC's press policy during the embargo period

The following outlines what is appropriate use of IDC Tracker and QView data and IDC's official announcement during an embargo period:

- IDC's official press announcement cannot be distributed to any external parties/press houses/journalists until the embargo period has been lifted.
- No external public statement, whether vendor or media driven, can be made during this time.
- Clients may conduct press outreach and briefings during this time as long as the client ensures that the press honors IDC's embargo period.
- Internal communications within the organization are acceptable as long as IDC's embargo is honored and IDC is sourced.

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- For client announcements after the embargo period, IDC requires prior written approval from IDC Permissions or the appropriate IDC research vice president or country manager. This includes any information to be used in advertising, press releases, sales collateral, or promotional materials.

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## Violation Policies

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In the event that a client violates IDC's embargo policy or fails to get IDC's approval for a press release or other public use of IDC data, IDC will take appropriate action to ensure that the violation does not happen again. These actions include the following:

- **First offense:** The company in violation of IDC's press guidelines, including failure to get the necessary approvals or failing to honor an embargo, will receive a written reminder of their contractual obligations regarding the use of IDC information. In response, the company needs to provide IDC with a written statement as to the steps they have taken to ensure that future problems do not occur.
- **Second offense:** The company in violation will not be allowed to finalize any Tracker or QView related press releases in advance. IDC will accomplish this by withholding approval of any press releases from that company until after the Tracker or QView data for that quarter has been made public by IDC. If the company issues a Tracker or QView related press release without IDC approval, IDC will decline to discuss that company's results with the media and reserves the right to issue a press release in response.
- **Third offense:** The company in violation will not receive embargoed Tracker or QView data in advance. Instead, the data will be withheld until IDC has gone public with the Tracker results for that quarter.

### Additional Rules

- **Time Frame:** Each offense will remain on the record for 12 calendar months. If a client does not commit a new violation in the 12 months following the initial offense, the next offense will be treated as a new first-time offense. However, a new offense committed within 12 months of the first offense will be counted as a second offense. Following a second offense, the client will need to go two years (24 calendar months) to clear their record.
- **Escalation:** Based on the severity of the violation, IDC reserves the right to escalate the remedial action as deemed appropriate.

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## Process for Submission:

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To secure permission to use IDC information, clients must submit a complete and final version of the content asset containing the IDC information to **permissions@idc.com**. This will enable IDC to gauge the full context of the usage and to ensure its accuracy, currentness, and proper attribution. Content assets are typically 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 include the source from which the IDC information was taken (see the source details in the Client Press Release Format section above) and clearly state the market, unit of measurement, and timeframe for the statement.
- To help facilitate the review process, please indicate whether any filters were used to derive the data being cited.
- 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.

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## Questions

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If you have any questions regarding these guidelines, please email **[permissions@idc.com](mailto:permissions@idc.com)** or call IDC's Permissions team at 508.935.4268 (inside the United States) or contact your local IDC country manager.

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