

WHITE PAPER

Datacenter-Delivered Services: The Service Provider Opportunity

Sponsored by: Cisco

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EXECUTIVE SUMMARY

The market for cloud/datacenter-delivered services represents a large and fast-growing opportunity for service providers. IDC predicts that the market opportunity for services delivered from cloud-based infrastructures will reach nearly \$40 billion in 2009 and grow to \$73 billion by 2015. While this projection encompasses a range of applications, it reflects existing service segments in which delivery is currently migrating to cloud/datacenter-delivered models. An even broader set of cloud-based services, many of which have yet to be created, will be delivered by an extremely diverse array of providers — IT hardware vendors, software developers, and "cloud-native" Web 2.0 content and application providers. This dynamic of supply and demand growth will result in a cloud-based service revenue opportunity that is even larger than the projections presented in this paper.

One of the key requirements for capitalizing on this opportunity is flexible, scalable service delivery architectures that enable rapid entry service creation, provisioning, and support. As traditional network-oriented service providers pursue strategies to keep pace with changing market dynamics, they will increasingly be forced to reevaluate every aspect of their existing business operations. Service providers' efforts in this regard can often be compromised by inefficiencies in their overall operational environments. These operational environments must be transformed and aligned with the evolving competitive environment, emerging business requirements, and new consumption models of the cloud era.

The sheer size and growth of the cloud/datacenter-delivered services opportunity will attract a variety of players from adjacent markets, all attempting to capture share and claim ownership of this space. As the competitive landscape expands to include a growing universe of nontraditional service providers, traditional network-oriented providers must reset their business models to combat the threat presented by the new "cloud-native" delivery paradigms. Traditional service providers need cloud migration strategies that incorporate cloud concepts of dynamic service creation, on-demand sourcing, automated provisioning, and diverse billing modalities. By leveraging existing foundational elements — network and datacenter assets and capabilities — traditional service providers have a natural starting point for aggressive expansion of their service portfolios and the means to compete more effectively with "cloud natives" that are standardizing on this type of operational infrastructure.

IN THIS WHITE PAPER

This IDC white paper examines service providers' opportunities and challenges in the emerging arena of cloud/datacenter-delivered service offerings. The enterprise networking/IT landscape is changing as new technologies, evolving service delivery architectures, disruptive business models, and mounting cost pressures transform the way businesses procure and consume communications, IT, and application services. This document presents a high-level view of the potential of datacenter-delivered cloud services to transform the process of service delivery and creation and thus expand the service provider value proposition.

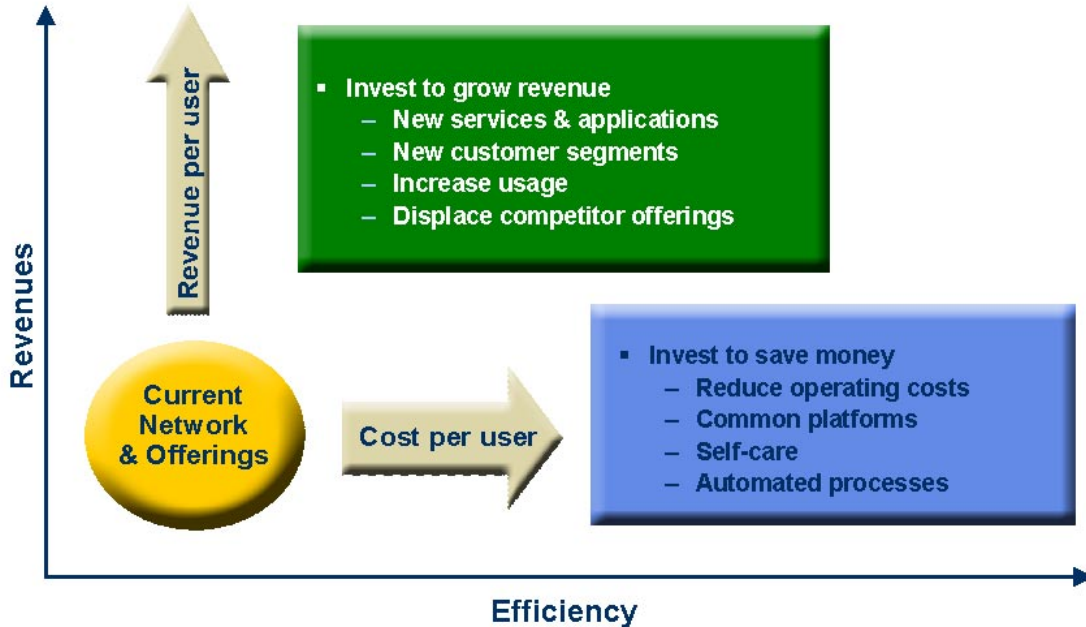
INTRODUCTION: DATACENTER-DELIVERED SERVICES

Cloud computing is part of the global transformation that is changing the way that business and consumers want networking, IT, entertainment, and application services to be delivered. For service providers, this shift requires new business models and approaches to the service delivery environment, which encompasses network and IT technology, infrastructure, operations, and processes. This service delivery transformation coincides with renewed service provider efforts to grow revenue and reduce costs in the current economic climate (see Figure 1).

Service providers are under more pressure than ever to grow revenue and improve profitability by introducing new services and reducing operational costs through more efficient service delivery. Next-generation datacenters play a vital, enabling role in the essential process of service provider business transformation and can accelerate service providers' efforts to make themselves key participants (rather than mere bandwidth sellers) in the emerging world of virtualized cloud services.

FIGURE 1

Key Business Objectives for Service Providers



Source: IDC, 2009

Broadly defined, cloud computing is an infrastructure architecture that combines virtualization; orchestration; multitenancy; and unified, scalable pools of hardware, software, and network resources to enable dynamic, on-demand delivery of IT and application functionality. For service providers, the datacenter-centric cloud computing model provides a new paradigm for rapid and flexible service creation and provisioning. This framework can yield benefits similar to those that came with the migration to consolidated IP-based networking, namely, the creation of a common integrated platform for multiple service provider offerings and customer use cases.

Transitioning to this new framework is a significant shift away from the current service delivery environment. Today, service providers typically offer broad portfolios of services, but current service delivery infrastructures are organized and structured narrowly around the provision of individual service offerings instead of being designed generically around the more expansive notion of service delivery. At present, individual services such as managed hosting, WAN optimization, and messaging/collaboration are siloed, with vertical stacks of enabling resources and components dedicated exclusively to the provisioning of that specific service. The existence of separate parallel service enablement environments not only results in fragmented, and therefore operationally inefficient service provisioning and management environments, but also limits providers' scope for cross-service integration, mass customization through innovative bundling and packaging, and the

evolution toward more streamlined approaches to new service development and feature/functionality enhancement.

This white paper focuses on the following set of cloud/datacenter-delivered service offerings:

- Advanced network services
 - Managed network services: WAN optimization
 - Content delivery network (CDN) services
 - Hosted security services
 - Hosted firewall
 - Intrusion detection/protection
 - Identity management
 - Hosted messaging security
- IT services
 - Hosting infrastructure services
 - Utility computing services
 - Infrastructure as a service
 - Storage as a service
- Application services
 - Collaboration services
 - Audio, video, and Web conferencing
 - Digital content management
 - Hosted application management
 - Software as a service (SaaS)

The following section of this white paper provides an overview of each of the above-mentioned services areas in terms of their definition, market opportunity for service providers, and overall trends.

DATACENTER-DELIVERED SERVICES: THE SERVICE PROVIDER OPPORTUNITY

Advanced Network Services

Managed Network Services: WAN Optimization

WAN optimization services improve the performance of applications over the WAN using a variety of techniques (caching, compression, traffic shaping and prioritization, and protocol conversion) that work individually or in concert to provide LAN-like performance across corporate networks for applications such as messaging, customer relationship management (CRM), disaster recovery, and datacenter migration. WAN optimization services can be asymmetric (at datacenter sites only) or symmetric (at both branch and centralized headquarters or datacenter locations).

IDC estimates that the worldwide market for WAN optimization services will increase from \$1.4 billion in 2009 to \$2.6 billion in 2015, growing at a seven-year CAGR of 11.1% (see Table 1).

The total market opportunity could potentially be greater because WAN optimization services can be positioned as complements to value-added class-of-service MPLS offerings. The WAN optimization value proposition can also be extended to include hosting services, managed storage, business continuity, application management, and SaaS.

A number of technology, IT architecture, and enterprise organizational trends have converged over the past few years to boost awareness of the need for a new application-aware approach to corporate networking. Enterprises continue to centralize and Web/IP-enable applications, consolidate datacenters, implement server virtualization, automate business processes, and leverage voice- and video-over-IP technologies. In addition, because today's "extended enterprises" feature supply chains of far-flung employees, customers, partners, and vendors, applications and business processes are increasingly network dependent. Growing volumes of traffic and expanding ranges of different traffic types are competing for bandwidth on increasingly converged corporate WANs, the result being suboptimal performance of mission-critical business applications.

Organizations continue to evaluate and deploy WAN optimization technologies as a key enabler of consolidation and virtualization initiatives, and many initially implement the technology via the classic in-house/do-it-yourself (DIY) approach. However, interest in the service provider approach is growing as enterprises look to curtail up-front capital costs and offload onerous ongoing monitoring and maintenance tasks. In addition, service providers that also operate next-generation IP networks can offer customers increased network visibility and control, thus enabling a more systematic approach to the increasingly taxing problem of guaranteeing the performance of applications over dynamic enterprise networks.

Content Delivery Network Services

Content delivery networks (CDNs) are geographically distributed networks of server and storage capacity that accelerate/optimize the delivery of Web/IP-based content by moving the content closer to end users' location by edge replication and caching. Content types handled by CDNs include static and dynamic HTML Web sites and images, video (streaming and progressive download), and edge computing applications.

IDC forecasts that the worldwide market for CDN services will increase from nearly \$1.7 billion to nearly \$4.4 billion in 2015, growing at a 17.1% seven-year CAGR (see Table 1).

While pricing pressures are impacting providers that serve both the high and low ends of the market, overall demand continues to grow, fueled in large part by the explosion of online digital media and other cloud-delivered business-to-consumer (B2C) and business-to-business (B2B) initiatives that leverage the Internet and/or IP networks as a distribution and transactional medium. Adjacent CDN service opportunities for providers include hosting, infrastructure as a service, managed storage, and digital content management.

Hosted Security Services

Security management has become one of the main challenges for organizations, and three main trends are fueling the market demand for cloud-based security services: security complexity, regulatory compliance, and total cost of ownership.

Today, organizations are growing at a rapid pace, and to remain competitive and profitable, they're required to operate in an open IT infrastructure environment and support remote employees; collaborate with partners, suppliers, and customers; and deploy new cost-cutting technology initiatives such as virtualized environments, unified threat management (UTM) appliances, and green IT initiatives. While an open IT infrastructure environment and innovative technologies enable companies to increase productivity and revenue, they also present potential security vulnerabilities.

To address these security vulnerabilities, organizations have moved away from deploying point products to building a comprehensive security architecture that utilizes a combination of security products and services in order to develop a comprehensive risk management strategy. Standalone security systems can no longer keep up with the sophisticated threat landscape, and IT security skills and expertise seem to be inadequate to address monitoring and management challenges. As a result, the move to build a more comprehensive security infrastructure will increase the level of complexity for many companies and make managed security services an attractive option.

As the threat landscape has evolved along with technology, government and industry initiatives have significantly increased to protect customers and organizations. Regulations such as HIPAA, the Sarbanes-Oxley Act, ISO, and PCI are the basis for building good business practices and developing a security framework to safeguard customer information as well as protect organizations from security breaches. To safeguard customer information, organizations are required to safely store customer

information online, as well as offline, for a certain period of time. In addition, to adhere to these regulations, organizations are required to monitor for potential vulnerabilities as well as monitor and manage all incoming activities and logs. Many enterprises are looking to solutions from third-party service providers to help ensure that they are adhering to regulatory mandates.

Many organizations are concerned with reducing cost and optimizing their infrastructure investment. In addition, they are constantly facing external as well as internal pressures to keep up with the quickly evolving threat landscape and the need to meet compliance requirements. Furthermore, the lack of in-house security expertise, as well as the cost of hiring a full-time staff of certified security experts, makes it very challenging for organizations to set up and manage their own security system. As these costs increase, hosted security services have become a more cost-effective means of providing security management.

Security will remain top of mind for most CIOs and will continue to be a priority in terms of IT spend. As the threat landscape has evolved and become more sophisticated, spending on security solutions will increase significantly over the next few years. Subsequently, demand for hosted security services will increase as enterprises look to leverage the scale and expertise of a third-party cloud security provider.

Datacenter-delivered security services are hosted offerings that include the following: firewall, intrusion protection, identity management, and messaging security.

Hosted Firewall

Hosted firewall service typically includes firewall hardware/software installation and provisioning and policy management for the firewall that reflects customers' firewall security requirements.

IDC forecasts that the worldwide market for hosted firewall services will increase from \$342 million in 2009 to \$1.05 billion in 2015, growing at a seven-year CAGR of 20.6% (see Table 1).

Intrusion Detection/Protection

Intrusion detection/protection services typically include the management of intrusion detection and prevention sensors, fine-tuning of rule sets and algorithms, and intrusion prevention services. Service capabilities include security event monitoring, analysis, and response/escalation procedure definition.

IDC forecasts that the worldwide market for intrusion detection/protection services will increase from \$104 million in 2009 to \$322 million in 2015, growing at a seven-year CAGR of 20.7% (see Table 1).

Identity Management

Identity management services generally include deployment and management of various types of digital certificates across an organization. Service capabilities also include management of authentication technologies, such as tokens or smart cards, that provide strong network access authentication and identity credentialing.

IDC forecasts that the worldwide market for identity management services will increase from \$111 million in 2009 to \$352 million in 2015, growing at a seven-year CAGR of 21.2% (see Table 1).

As organizations are required to collaborate with partners and customers and provide them with secure access to the appropriate systems and applications, they are faced with the challenge of managing a very complex environment in-house. Adding to this challenge are the numerous compliance mandates that are forcing organizations to outsource these services to a security services provider.

Hosted Messaging Security

Secure email service provides perimeter-based email security and message management services to enterprises. The service ensures the integrity of electronic messaging before it passes through corporate network gateways by providing a front line of defense that acts as a safe bridge between the Internet and the corporate network. The service incorporates content filtering, spam filtering, virus blocking, email policy enforcement, and disaster recovery for both inbound and outbound messages, all delivered through a global network of redundant datacenters.

Content security service preemptively blocks malicious downloads before they enter the network, scans outbound connections and phishing activity, scans contents of Web sites and URLs, and enforces access and communications policies against instant messaging and audio and video streaming. Features covered include antivirus, antispyware, and Web filtering and blocking.

IDC forecasts that the worldwide market for hosted messaging security services will increase from \$745 million in 2009 to \$2.5 billion in 2015, growing at a seven-year CAGR of 22.3% (see Table 1).

Due to the explosive increase in the volume of spam, hosted messaging security services are becoming an attractive option for many organizations. Enterprises have shown increasing interest in hosted messaging security services, with companies employing a hybrid approach that leverages the email hygiene benefits of an in-the-cloud hosted service with the granular policy enforcement, encryption, and data loss prevention capabilities of an on-premise solution. A growing number of enterprise organizations have adopted a layered messaging security approach that combines an in-the-cloud hosted service with an on-premise hardware or software solution.

TABLE 1

Market Forecast: Advanced Network Services (\$M)

Level 1	Level 2	2009	2010	2015	2009–2015 CAGR (%)
Advanced network services		4,374.8	5,171.8	11,195.2	17.0
Managed network services	WAN optimization	1,384.0	1,543.2	2,606.7	11.1
Content delivery network services		1,688.3	1,974.3	4,363.2	17.1
Hosted security services		1,302.5	1,654.3	4,225.3	21.7
	Hosted firewall	341.9	403.9	1,052.1	20.6
	Intrusion detection/protection	104.0	123.5	322.2	20.7
	Identity management	111.1	131.0	352.4	21.2
	Hosted messaging security	745.4	995.9	2,498.6	22.3

Source: IDC, 2009

IT Services***Hosting Infrastructure Services***

Hosting infrastructure services are externally provided services delivered from third-party service provider datacenters related to the management and maintenance of the hardware, software, and networking environments that support businesses' server-based applications, including public, Internet-facing Web sites; corporate intranets; Web/IP-based enterprise applications; and private extranets.

IDC forecasts that the worldwide market for hosting infrastructure services will increase from \$22 billion in 2009 to \$33.8 billion in 2015, growing at a seven-year CAGR of 7.4% (see Table 2).

Utility Computing Services

Utility computing services generally involve multitenant resource platforms on which individual customers or workloads share variable amounts of a common IT infrastructure (servers, storage, operating systems, networking, etc.) that is owned and managed by the service provider. The platform virtualizes and provisions IT services to customers when requested by the service provider or the customer via self-service mechanisms or when automatically allocated (triggered by capacity, bandwidth, and/or CPU utilization).

Infrastructure as a Service

Infrastructure as a service is a service delivery model in which computing resources are made available to the user on an as-needed basis, structured either as a pay-as-you-go/pay-per-use offering or as a utility offering with fixed monthly service fees for a defined server resource allocation and an on-demand option to accommodate situations where additional compute capacity above the contracted allocation is required.

IDC forecasts that the worldwide market for infrastructure as a service will increase from \$734 million in 2009 to \$2.4 billion in 2015, growing at a seven-year CAGR of 22.1% (see Table 2).

Storage as a Service

Storage as a service is an online storage utility offering that includes both pay-as-you-go models (i.e., "cloud") and on-demand pay-as-you-grow service models featuring precommitted storage capacity that the customer may use up to an agreed-upon amount and on-demand is storage that may be used but is not precommitted. Like infrastructure as a service, storage as a service is a datacenter-centric offering, delivered from an offsite third-party service provider.

IDC forecasts that the worldwide market for storage as a service will increase from \$2.8 billion in 2009 to \$11.1 billion in 2015, growing at a seven-year CAGR of 26% (see Table 2).

TABLE 2

Market Forecast: IT Services (\$M)

Level 1	Level 2	2009	2010	2015	2009–2015 CAGR (%)
IT services		25,524.9	28,352.6	47,371.8	10.9
Hosting infrastructure services		22,005.3	23,414.6	33,842.9	7.4
Utility computing services		3,519.6	4,938.1	13,528.9	25.2
	Infrastructure as a service	734.1	850.2	2,434.4	22.1
	Storage as a service	2,785.5	4,087.9	11,094.6	25.9

Source: IDC, 2009

Application Services***Collaboration Services***

Collaboration services combine communications and IT capabilities in a way that enables synchronous (real-time) and nonsynchronous (non-real-time) interaction among dynamic groupings of individuals and/or teams. Collaboration solutions can be configured as discrete point solutions or as highly integrated software-based infrastructure platforms that combine user presence and availability data with voice, video, email, and instant messaging functionality that enables users to communicate via the optimal path at a given point in time. Collaboration services can be delivered to enterprise users from a third-party service provider datacenter at the customer premises or via hybrid models.

IDC forecasts that the worldwide market for collaboration services will increase from \$5.6 billion in 2009 to \$10.4 billion in 2015, growing at a seven-year CAGR of 11% (see Table 3).

Digital Content Management

Digital content management services are hosted offerings that support management, syndication, monetization, and delivery/payout (streaming) of video and other digital content to end users on the public Internet and/or internal private IP networks. Digital content management service features include video ingestion, encoding/transcoding control, asset management, business rules, user directory, user management, and

content cataloguing. Content management complements (but does not include) external or private content delivery services (i.e., CDN services).

IDC forecasts that the worldwide market for digital content management services will increase from \$206 million in 2009 to \$504 million in 2015, growing at a seven-year CAGR of 16% (see Table 3).

Hosted Application Management

Hosted application management (hosted AM) is a one-to-many service in which customers' dedicated packaged application instances are hosted and managed from service providers' datacenters. The main value proposition of the hosted model is that because the vendor has complete ownership and control over the hardware environment, customers are freed from the costs and time associated with managing the systems upon which their applications are running. Standard application-related services such as installation, testing, and maintenance (including patches and fixes) are built into a hosted AM service. Over time, IDC believes that a portion of the hosted AM market will migrate to the SaaS model.

IDC forecasts that the worldwide market for hosted application management services will increase from \$5.9 billion in 2009 to \$12.0 billion in 2015, growing at a seven-year CAGR of 12.5% (see Table 3).

Software as a Service

SaaS is a service delivery model in which unrelated customers share a common application (i.e., shared application instances) that runs on a common infrastructure platform owned and managed by the service provider. This model, which is multitenant at both the application and infrastructure layers, is designed for one-to-many delivery of software-based application functionality over the public Internet or private IP networks. SaaS consumption models involve no up-front software licensing fees, and pricing is subscription based (i.e., "per seat") or utility based (where end-user charges are determined by the level/volume of application usage).

IDC forecasts that the worldwide market for SaaS will increase from \$242 million in 2009 to \$717 million in 2015, growing at a seven-year CAGR of 20% (see Table 3).

TABLE 3

Market Forecast: Application Services (\$M)

Level 1	Level 2	2009	2010	2015	2009–2015 CAGR (%)
Application services		12,025.8	13,343.9	23,639.39	11.9
Collaboration services		5,641.0	6,040.9	10,394.2	10.7
	Audio conferencing	4,144.9	4,225.3	4,300.0	0.6
	Video conferencing	367.9	549.4	3,579.1	46.1
	Web conferencing	1,128.1	1,266.2	2,515.1	14.3
Digital content management services		205.8	259.3	503.9	16.1
Hosted application management services		5,936.6	6,754.0	12,024.1	12.5
Software as a service		242.4	289.7	717.2	19.8

Source: IDC, 2009

MARKET CHALLENGES/OPPORTUNITIES

In today's market, service providers are faced with the challenge of enterprises focused on reducing their costs and optimizing existing investments. Despite the current economic climate, enterprises' IT and application requirements continue to expand even with increasingly constrained short-term IT budgets. Utilizing datacenter-delivered service offerings provides a seamless way for enterprises to get "more" done with "less." The importance of leveraging managed services, collaborative and conferencing applications, as well as hosted application, computing, and security services should be viewed as an addressable market opportunity by service providers (refer back to Tables 1, 2, and 3).

Partly driven by the increased level of technical complexity and cost constraints, enterprises are showing an increasing willingness to leverage the scale and expertise of service providers that can serve their needs for IT infrastructure and

communications, collaboration, and enterprise application services using flexible and lower-cost cloud-based service delivery platforms. In this current environment, the opex-oriented service provider model becomes an even more attractive alternative to the capital-intensive in-house/DIY model. This presents a significant opportunity to service providers in being able to move from low-value/low-margin services such as hosted services to higher-value/higher-margin services in the areas of advanced network services, IT services, and application services.

On the other hand, these services areas pose their own sets of challenges to providers as they are required to handle and manage enterprise issues such as security and governance. Despite these challenges, service providers possess a unique set of assets that can be leveraged to overcome these hurdles and improve their competitive position to meet emerging enterprise IT/telecom needs.

The emerging technologies also provide a unique set of opportunities to service providers. By leveraging technologies such as virtualization, they can better utilize their IT and network assets, as well as leverage third-party applications and services to drive higher-value services to market. A datacenter-delivered environment provides a common compute and network infrastructure that allows service providers to rapidly capture new revenue streams through expansion of the existing network-centric portfolio with value-added IT and application services areas that can be offered in a cloud-based delivery model. As a result, service providers can offer a broader array of services to their existing base of consumer and enterprise customers and position these offerings as a "foot in the door" strategy into new accounts. In addition, unified service delivery environments enable greater flexibility around how these services are delivered, potentially facilitating entry into new geographic markets with location-independent offerings delivered from the cloud.

The implementation of unified service delivery infrastructure enables service providers to support the following strategic objectives:

- ☒ Reduce time to market for new services
- ☒ Lower development costs
- ☒ Reduce service deployment/introduction risks

CONCLUSION/RECOMMENDATIONS

The telecommunications and IT industries are in the midst of a major transformation. The once separate worlds of media/entertainment, IT, and communications are unifying and converging, creating new market paradigms, technology requirements, and business models for service providers. These areas drive the growth in demand for enterprise IT/telecom areas such as advanced network services, IT services, and application services (refer back to Tables 1, 2, and 3). This new environment offers tremendous opportunity to service providers that can drive innovative services to market and create unique customer experiences.

Service providers responding to current market dynamics by executing transformation strategies will be able to improve their competitive position, offer a broader array of services, and target new revenue streams that they were not effectively able to address in the past. Migrating to a unified service delivery infrastructure holds the key to driving innovative services to market while establishing meaningful differentiation from traditional and nontraditional competitors. Successful service providers in the future will be differentiated by their ability to move beyond basic services and enable new business models and rapidly create new services, such as hosted security and WAN optimization (refer back to Table 1), hosting infrastructure and utility computing (refer back to Table 2), and application services (refer back to Table 3).

The revenue opportunity associated with these datacenter-delivered services and unified service environments is expected to reach nearly \$40 billion in 2009 with a seven-year (2009–2015) CAGR of 12%.

IDC recommends that to effectively exploit the large and fast-growing opportunities in the areas of advanced network services, IT services, and application services, service providers take the following actions on the path toward monetizing their investments in unified service delivery infrastructure:

- ☒ Initially target new service areas that are closely aligned with existing core network/transport capabilities and leverage these network-adjacent offerings to expand into high-level services. Services that fall under this criteria include WAN optimization, content delivery network, hosted security, and utility computing.
- ☒ Develop broad ecosystems of technology and application partners to build a comprehensive suite of services targeted at multiple sets of customers, including enterprises, small businesses, and consumers. Partnerships will be particularly vital in areas such as IT and application services where traditionally network-oriented service providers need to establish brand credibility and end-to-end service management competency.
- ☒ Develop a clear understanding of enterprise and consumer wants and needs to develop services that address these requirements. However, service functionality is only the beginning: Providers must also establish processes and best practices around customer support, self-service capabilities and controls, security, governance, and quality assurance. In particular, this applies to hosted security service areas.
- ☒ Establish collaborative, multidimensional relationships with application, IT, and content partners via "sell to" and "sell with" arrangements. Unified service delivery environments can expand the range of offerings that providers can sell to partners while the service delivery infrastructure combined with the ability to leverage billing relationships with existing network services customers offers joint selling and integrated solutions opportunities that can expand customer share of wallet and help forge relationships with new constituencies inside current customer accounts.

- ☒ Target near-term operational efficiencies by consolidating IT and network resources. This will allow service providers to address concerns around increased operating costs.
- ☒ Take a holistic view of the datacenter and core network and align operations to create a common management processes to ensure end-to-end application performance.
- ☒ Provide a secure environment for data and content when it is stored and as it traverses the network because security is a top concern for companies evaluating cloud-based services.

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