

## ***IDC's Emerging Technology Advisory Services (ETAS)***

In an industry largely defined by fast-paced technological innovation, convergence, alliance and acquisitions, organizations need to adapt their 'traditional' business models into more agile and flexible practices while sustaining competitive advantage and generating business value. This disruptive nature of the industry means that it is becoming increasingly important for stakeholders to keep abreast of what is potentially 'The Next Big Thing' in order to be first to market with new ideas that are financially attractive. To cater to this audience, IDC has established a new program, called the Emerging Technology Advisory Services (ETAS) in Asia/Pacific.

### **Emerging Technology Council**

ETAS, helmed by the Emerging Technology Council (ETC) in Asia/Pacific, consisting of 10 senior IDC analysts and executives, is responsible for the identification of new technologies and trends in the ICT industry. Through a careful selection process, the ETC qualifies these new ideas and tests the products with the target audience/market to determine commercial viability. This process ensures a faster response to the market needs and focuses on emerging new areas.

### **The Next Big Thing**

These are some of the new research areas and products that IDC has scheduled going forward:

- **Cloud Computing**

Cloud computing is reshaping the IT marketplace, creating new opportunities for suppliers and catalyzing changes in traditional IT offerings. Over the next five years, IDC expects spending on IT cloud services to grow almost threefold, reaching \$42 billion by 2012 and accounting for 9% of revenues in five key market segments. More importantly, spending on cloud computing will accelerate throughout the forecast period, capturing 25% of IT spending growth in 2012 and nearly a third of growth the following year. IDC expects the cloud adoption trend to be amplified by the current financial crisis. The cloud model offers a much cheaper way for businesses to acquire and use IT – in an economic downturn, the appeal of that cost advantage will be greatly magnified. This advantage is especially important for small and medium businesses, a sector that will be key target in any plan for recovery.

Our survey results suggest we're entering a period of accelerating IT cloud services adoption, with the portion of organizations exhibiting significant adoption moving from 15-25% today to 25-45% in three years. It's not a big leap to consider - given the chart above and the chart below - that IT cloud services are either at, or getting very close to, the "crossing the chasm" stage.

If this is so, the implication for IT suppliers is very clear: the next three years, as IT cloud services expand from Early Adopters to the Early Majority, is the critical time to develop strong cloud offerings, and play a leadership role in bringing customers, your own organization and your partner ecosystem "across the chasm". As Moore famously points out, suppliers who fail to seriously contend for a leadership role will be left with decidedly minority share as their reward.

IDC is planning a series of events and surveys in the region in 2009. For more information about this, please contact your friendly IDC Account Manager.

- **Advanced Customer Care and Retention**

Enterprises spend vast amounts of advertising budgets on connecting with the "me" factor in their customer base – especially as new generations of savvy and more cash-rich Asian customers want products and services customized to their needs. For this to happen, enterprises need to create avenues for a free flow of information between the enterprise and the customer. Web 2.0 tools are evolving as powerful avenues for this freewheeling communication between customers, self-appointed critics and the enterprise.

The cost of business by selling a product to a new customer is many-fold higher than selling to an existing customer, so keeping the churn down should thus be a key focus area in 2009. IDC expects some of these companies to explore new methods of liaising with their customers going forward, especially focusing on the web and on other IP-based platforms – something IDC sees as "Advanced Customer Care and Retention" approaches.

ETAS will conduct research throughout 2009, providing insight into the needs and wants for future generations as well as new technologies and approaches that can help companies taking their customer care programs to the next level.

For more information about this, please contact your friendly IDC Account Manager.

- **Enterprise Search**

As the significance of controlling the costs of information search within organization has increased, the Enterprise Search market has grown in strategic importance. Furthermore, good search options are extremely important if a company is to get the full benefit of a comprehensive business information management system. Enterprise Search, at least in theory, allows companies to both cut costs and maximize productivity thus helping both the bottom and the top line of the balance sheets. Aligned to this is the above-mentioned growth of cloud computing which also accelerates the importance of Enterprise Search.

IDC predicts that the increasing strategic importance of search will drive further consolidation among enterprise search vendors in 2009, opening the way for big Internet search players to enter the market traditionally dominated by software vendors and systems integrators. The attraction for Asian developed search algorithms and non-English based search engines will result in Asian companies and developers being targeted by global Enterprise Search vendors as they try to maintain growth in 2009. ETAS will therefore be studying the Enterprise Search market in more detail in 2009.

For more information about this, please contact your friendly IDC Account Manager.

- **Digital Marketplace and New Media**

The term "Web 2.0" has been around for a while yet and may already appear dated as companies are looking beyond the immediate term for their future strategies. Whatever you choose to call new web-based approaches and services, most companies are still at odds with how to tackle this new digital marketplace, and most companies have yet to figure out how to monetize web-based offerings.

In order to provide insight into how consumers use the new web and how advertising and chargeable value-added services can sustain new business models, IDC has launched its **Asia/Pacific Digital Marketplace and New Media** research covering this dynamic space. This program delivers research on significant activities in the online marketplace, including end-user surveys on the main areas of consumer usage of new web-based services and applications. It also includes an extensive database covering Digital Marketplace and New Media usage and spending in 13 Asian markets (excluding Japan).

Check out our product details on [Asia/Pacific Digital Marketplace and New Media](#)

- **Green IT**

The 'Green IT' phenomenon continues to attract a great deal of attention in the Asia/Pacific region. Most of the action has been seen coming from the vendor community, with a number of vendors launching products, solutions and campaigns in the Green IT space. End-users are also starting to move, but the key focus has been on infrastructure optimization in a bid to reduce costs associated with energy consumption. As a result of this, IDC has seen significant investments being made in data center virtualization, consolidation, blades & to a certain extent thin clients, as clients start to 'discover' the previously hidden energy costs associated with the running of their IT infrastructure. For most of these projects, the 'Green' component (in terms of benefiting the environment) has been more of a bonus as opposed to the underlying driver. Environmental sustainability (i.e. reducing the carbon footprint of IT to help mitigate climate change) is a lot lower on the list of priorities.

Despite this, results from the IDC's ongoing **Asia/Pacific Green Poll** – end-user surveys assessing the buying behavior of IT executives with respect to Green IT in the Asia/Pacific region – highlight that across the board, end users are expecting vendors to take more responsibility in terms of bringing 'Green' products and services to market, as well as improving their own internal 'Green' operations and practices in the future. The key takeaway for vendors is the need to ensure that they are making a business case for Green IT in the context of reducing cost in the short term. Further down the line, as governments become more active in terms of regulating this area, IDC expects the broader notions of corporate social responsibility and sustainability to become increasingly important and drive both growth and financial benefits in this market.

To purchase the **Asia/Pacific Green Poll** results, or to engage with our Green IT research expert analyst, please contact your friendly IDC Account Manager.

Check out our product details on [Asia/Pacific Green IT](#)

<b>Your Business Value/Benefits – How IDC Can Help You</b>
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In the Emerging Technology area, IDC can be your strategic partner delivering value in the following areas:

- Utilize IDC research and thought leadership to create fresh, customized content that you can leverage to augment, support, or drive your go-to-market initiatives
- Work closely with IDC analysts to provide insights, program direction, best practices and deliverables to help your team achieve optimum go-to-market results
- Co-brand with a globally recognized industry leader – the power of the IDC brand lends greater credibility, drives more attention, educates target audiences, and deepens audience interest with credible, independent and objective third party thought leadership
- Audience Education – IDC speaker to address key issues surrounding Emerging Technology at your event attended by your key stakeholders, including legislators, regulators, government bodies, educational institutions, media, customers, etc.
- Custom events – IDC to organize events for your targeted audience, e.g. HR for talent seeding investments, product offering testing platform, customer feedback roundtables
- Case studies & best practices – IDC's expert analysts to work with you on creating highly relevant content
- End-User Poll – IDC to design, administer, and present results

## Asia/Pacific Experts

IDC's Asia/Pacific ETAS has invested in industry experts who have extensive experience and/or experience in emerging technologies research, to deliver groundbreaking and reliable market intelligence to our clients.



### [Sandra Ng](#)

#### **Group VP, Asia/Pacific Communications, Peripherals and Services Research**

Sandra Ng has been in the IT and Telecom advisory services and market research/consulting industry for more than 15 years with extensive experience in providing consulting and advisory services to clients in the industry.



### [Claus Mortensen](#)

#### **Principal, Asia/Pacific Emerging Technologies Research**

Claus Mortensen is the Principal for IDC's Emerging Technology Advisory Services – including the Digital Marketplace & New Media program. As a founding member of IDC's Emerging Technologies Council, Claus' main focus is to identify 'The Next Big Thing' in the ITC space as well as explore the impact of Web 2.0 and New Media in the Asian Digital Marketplace.



### [Patrick Chan](#)

#### **Chief Technology Advisor, Asia/Pacific Emerging Technologies Research**

Patrick Chan, Ph.D., has over 18 years of academics and industry consulting experience. As Chief Technology Advisor of IDC's Asia/Pacific Emerging Technologies practice based in Singapore, Patrick's focus and expertise is in the areas of Service-Oriented-Architecture (SOA), Business Activity Monitoring, Composite Applications, Standards and Integrations (EAI), Grid Computing, Enterprise Architecture and Infrastructure, and other emerging technologies.



### [Philip Carter](#)

#### **Head, Asia/Pacific Green IT Practice**

Philip Carter is the Principal for IDC's Asia/Pacific Green IT Practice. IDC's ongoing Asia/Pacific Green Poll; end-user surveys assess the buying behavior of IT executives with respect to Green IT in the Asia/Pacific region. In addition, Philip is also the Associate Research Director for IDC's Asia/Pacific where he leads the custom and database research of all Services sectors across the Asia/Pacific region.



### [Debbie Swee](#)

#### **Market Analyst, Asia/Pacific Emerging Technologies Research**

Debbie Swee is a Market Analyst for IDC's Asia/Pacific Emerging Technology Advisory Services group. Her research explores the Asia/Pacific digital and new media marketplace, addressing issues and forecasting trends for both supply-side and end-user groups within the Web 2.0 arena.



### [Audrey Heng](#)

#### **Associate Market Analyst, Asia/Pacific Emerging Technologies Research**

Audrey Heng is an Associate Market Analyst for IDC's Asia/Pacific Emerging Technology Advisory Services group. Her research looks into the digital and new media marketplace, addressing issues and forecasting trends for both supply-side and end-user groups within the Web 2.0 arena. Audrey is also responsible for creating and maintaining databases as well as publishing research that has a focus on regional Green IT.

**FOR MORE INFORMATION, VISIT [WWW.IDC.COM.SG/ETAS](http://WWW.IDC.COM.SG/ETAS)**



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