

Worldwide Semiannual Software Tracker

IDC's *Worldwide Semiannual Software Tracker*® monitors the software industry with frequent releases of semiannual software revenue estimates. It tracks and details individual software vendors' historical business performance and forecasts the development of the industry five years into the future — across 53 geographies in 80+ discrete software market segments. In addition, the tracker provides an understanding of the transition from traditional on-premise deployments to public cloud services by segmenting total software revenue by deployment types — by vendor, country, and market segment. With the rapid transition from 2nd Platform to 3rd Platform technologies, it is critical for software vendors, public cloud services providers, supply chain partners, and the investment community to understand this transition and how it differs by market segment and geography. The tracker answers the question: Who is winning the cloud battle?

Technology Coverage

This tracker provides total market size and vendor shares for 80+ software markets. Measurement for this tracker is total software revenue, which includes license, maintenance, and subscription revenue (including public cloud services). The following section lists the secondary software markets that group the 80+ functional software markets reported.

Core Coverage

- Application development software
- Application platforms
- Collaborative applications
- Content applications
- Customer experience applications
- Artificial intelligence and analytics software
- Endpoint management software
- Engineering applications
- Enterprise resource management (ERM) applications
- Integration and orchestration middleware
- Network software
- Operations and manufacturing applications
- Quality and life-cycle tools
- Security software
- Storage software
- Data management software
- Supply chain management (SCM) applications
- System and service management software
- Physical and virtual computing software

Optional Deployment Type Segmentation

- On-premise/other software
 - Public cloud services
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Geographic Scope

- **Asia/Pacific excluding Japan (13):** Australia, Hong Kong, India, Indonesia, Korea, Malaysia, New Zealand, Philippines, PRC, Singapore, Taiwan, Thailand, Vietnam, and Rest of Asia/Pacific
 - **Canada**
 - **Central and Eastern Europe (5):** Czech Republic, Hungary, Poland, Romania, Russia, and Rest of CEE
 - **Japan**
 - **Latin America (7):** Argentina, Brazil, Chile, Colombia, Mexico, Peru, Venezuela, and Rest of Latin America
 - **Middle East and Africa (6):** Algeria, Israel, Saudi Arabia, South Africa, Turkey, United Arab Emirates, and Rest of MEA
 - **United States**
 - **Western Europe (16):** Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, and the United Kingdom
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Data Deliverables

This tracker is delivered on a semiannual basis via a web-based interface for online querying and downloads. The following are the deliverables for this tracker. For a complete delivery schedule, please contact an IDC sales representative.

- Half-year vendor shares by competitive market by geography
 - Annual five-year forecasts by competitive market by geography
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Forecast Coverage

Annual five-year market forecasts for this tracker are updated semiannually and include five-year annual market projections. Forecasts are available at the worldwide, regional, and country levels. Details of the forecasts included in this tracker are as follows.

Core Forecast Coverage

- Markets (see the Technology Coverage section)
- Regions
- Countries

Optional Deployment Type Segmentation

- On-premise/other software
- Public cloud services

IDC's Tracker Methodology

IDC's tracker data is developed using a rigorous methodology that includes well-planned and well-coordinated local, regional, and worldwide data cross-checks combined with a proprietary advanced data consolidation and analysis data platform managed by IDC's Worldwide Tracker organization. Data sources used in the process of determining IDC's tracker numbers include, but are not limited to:

- In-country local vendor interviews
- Distribution data feeds
- Worldwide and regional vendor guidance
- ODM data
- In-country local channel partner discussions
- Import records
- Feedback from component suppliers
- Vendor briefings and public financial reports

Enabling Better Business Decisions Across the Organization

IDC trackers provide the accurate and timely market size, vendor share, and forecast information you need to identify market and product expansion opportunities, increase revenue, and win market share. IDC's tracker research is a critical input to the planning and monitoring cycles of the business process. Common uses of the tracker data include:

Planning Process

- Regional-, state-, or city-level planning — setting regional-, country-, state-, or city-level sales targets based on market opportunity
- Product marketing — creating a product strategy and road map based on currently available product features and expected growth
- Production planning — using customer demand data as an input in the creation of production schedules
- Product portfolio planning — accessing accurate and detailed data as an input into the product development process

Monitoring Process

- Performance measurement — comparing vendor performance on prior fiscal periods
- Competitive analysis — reviewing competitor performance across multiple dimensions: product, features, channel, segment, and geography
- Sales forecasting measurement — assessing internal sales forecast versus actual results
- Price benchmarking — comparing vendor versus market pricing data by model
- Marketing communications — using positive results for messaging in the press, at partner events, or in sales collateral

IDC's Global Tracker Process at Work

