Worldwide Quarterly Enterprise Infrastructure Tracker: Buyer and Cloud Deployment

IDC's *Worldwide Quarterly Enterprise Infrastructure Tracker: Buyer and Cloud Deployment*® is designed to provide clients with a better understanding how enterprise infrastructure technologies (server, external enterprise storage systems, purpose-built appliances: HCI and PBBA) are being deployed in cloud environments and what type of buyers are acquiring them. This tracker will segment each enterprise infrastructure technology market into infrastructure platform, infrastructure sharing, location, and infrastructure buyer for historical data and provide a five-year forecast by technology market. This tracker product addresses key questions on the size of the enterprise infrastructure market spend within the cloud and non-cloud space by buyer type and helps vendors navigate and perform competitive analysis.

Technology Coverage

This tracker provides total market size and vendor share information for eight technology areas. Measurements for this tracker are in system units*, units*, terabytes, vendor revenue, and value (*figures not available for storage categories).

Core Coverage:

- Region and country
- Technology segments: HCI appliances, ODM custom-built server, ODM storage expansion, OEM custom-built server, OEM storage expansion, PBBA, standard server, storage system
- Vendor: Top 15 vendors plus others
- Infrastructure platform: Cloud, non-cloud
- Infrastructure sharing: Dedicated, shared

- Location: Customer site, service provider site, colocation site
- Infrastructure buyer: Cloud infrastructure and software and digital services, communications services, managed services, non–service provider
- Measurements: System units*, units*, terabytes, vendor revenue, value (* Not available for ODM storage expansion, OEM storage expansion, PBBA, and storage system technologies)

Geographic Scope

- **Asia/Pacific excluding Japan and China (13):** Australia, Hong Kong, India, Indonesia, Korea, Malaysia, New Zealand, Philippines, Singapore, Taiwan, Thailand, Vietnam, and rest of Asia/Pacific
- **Canada**
- **Central and Eastern Europe (8):** Czech Republic, Hungary, Poland, Romania, Russia, Slovakia, Ukraine, and rest of CEE
- **Japan**
- **Latin America (12):** Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Mexico, Paraguay, Peru, Uruguay, Venezuela, and rest of Latin America

- **Middle East and Africa (17):** Algeria, Bahrain, Egypt, Israel, Kenya, Kuwait, Morocco, Nigeria, Oman, Pakistan, Qatar, Saudi Arabia, South Africa, Tunisia, Turkey, United Arab Emirates, and rest of Middle East and Africa
- **PRC**
- **United States**
- **Western Europe (16):** Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, and United Kingdom

Data Deliverables

This tracker is delivered on a quarterly 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.

- Historical data (Excel pivots and query tool)
- Five-year forecast (Excel pivots and query tool)

Forecast Coverage

Forecasts for this tracker are updated quarterly and include five years of annual market projections. Measurements for this tracker are in units, terabytes, and value.

Core Forecast Coverage:

- Technology segments: HCI appliances, ODM custom-built server, ODM storage expansion, OEM custom-built server, OEM storage expansion, PBBA, standard server, storage system
- Infrastructure platform: Cloud, non-cloud
- Infrastructure sharing: Dedicated, shared
- Location: Customer site, service provider site, colocation site

- Infrastructure buyer: Cloud infrastructure and software and digital services, communications services, managed services, non–service provider
- Measurements: System units*, units*, terabytes, vendor revenue, value (* Not available for ODM storage expansion, OEM storage expansion, PBBA, and storage system technologies)

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

Local Relationships
> Interview local channels and vendors
> Analyze import records and distributor feeds
> Maintain local market and competitive expertise

Global Expertise
> Define IDC's taxonomy
> Hold discussions with worldwide headquarters of vendors
> Own IDC's global technology vision

Common Web Based Data Collection, Analysis, and Repository Tool

Regional Oversight
> Pan-regional comparisons and analysis
> Interview regional headquarters of vendors
> Hold a regional market perspective

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IDC_P31615_0821