

Worldwide Semiannual Services Tracker

IDC's *Worldwide Semiannual Services Tracker*® provides detailed, timely, and accurate information on the global IT and business services markets. It provides vendor revenue share and annual forecast data on semiannual basis across 53 geographies and 14 market segments. It helps global and local players to assess services market dynamics and benchmark themselves. There are two core deliverables. The first allows flexible viewing of five years of historical vendor revenue by country and service line, highlighting market size and market share for each firm. The second provides a five-year forecast of annual data updated semiannually, allowing one to evaluate enterprises' and government agencies' services spending across different services markets, regions, and countries. Essentially, the services tracker provides a holistic view of the past, present, and future of the services world. Also included are add-ons as well as a qualitative summary of "what has changed" (i.e., vendor "historical changes"), market forecast updates, and so forth.

Technology Coverage

This tracker provides total market size, vendor share, and forecast for the following market areas and segmentations. Measurement for this tracker is in vendor revenue. Current currency and constant currency views are available.

Core Coverage

Market Segmentations:

- **Vendor**
- **Services category:** IT and business
- **Primary markets (3):** Project oriented, outsourcing, and support/training
- **Secondary markets (8):** Business consulting, IT consulting, systems and network implementations, application development, business process outsourcing, technology outsourcing, IT deploy and support, and IT education and training

- **Foundation markets (14):** Business consulting, IT consulting, systems integration, network consulting and integration, custom application development, key horizontal business process outsourcing, application management, hosted application management, IT outsourcing, network and endpoint outsourcing services, hosting infrastructure services, hardware deploy and support, software deploy and support, and IT education and training

Optional Historical Add-On

- **Product engineering services add-on:** product engineering services breakout of major services providers (already tracked in tracker) + 10-15 net-new PE niche players
- **Net remainder breakout:** Others (other vendors) and sub-contracting (available by 53 geographies)

Geographic Scope

- **Asia/Pacific (excluding Japan and PRC) (12):** Australia, Hong Kong, India, Indonesia, Korea, Malaysia, New Zealand, the Philippines, Singapore, Taiwan, Thailand, Vietnam, and the rest of Asia/Pacific
- **Canada**
- **Central and Eastern Europe (5):** Czech Republic, Hungary, Poland, Romania, Russia, and the rest of Central and Eastern Europe
- **Japan**
- **Latin America (7):** Argentina, Brazil, Chile, Colombia, Mexico, Peru, Venezuela, and the rest of Latin America
- **Middle East and Africa (5):** Israel, Saudi Arabia, South Africa, Turkey, United Arab Emirates, and the rest of the Middle East and Africa
- **PRC**
- **United States**
- **Western Europe (16):** Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, and the United Kingdom

Data Deliverables

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

- Historical data
- Forecast data

Forecast Coverage

Forecasts for this tracker are updated semiannually and include five years of annual market projections. Forecasts are available at the worldwide, regional, and country levels. Measurement for this forecast is in spending revenue. Details of the forecasts included in this tracker are as follows:

Core Forecast Coverage

Market Segmentations:

- **Services category:** IT and business
- **Primary markets (3):** Same as above
- **Secondary markets (8):** Same as above
- **Foundation markets (14):** Same as above

Optional Forecast Add-On

- **Business process outsourcing sub-foundation markets (5 sub-foundation markets available by 53 geographies)**
- **Cloud segmentations (available by 53 geographies):** Cloud-related and noncloud
- **Security segmentations (available by 53 geographies):** Security related and non-security

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

