

Understanding and Working with  
IDC Custom Solutions Content

# Content Usage Guidelines for Clients

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## Using the Guidelines

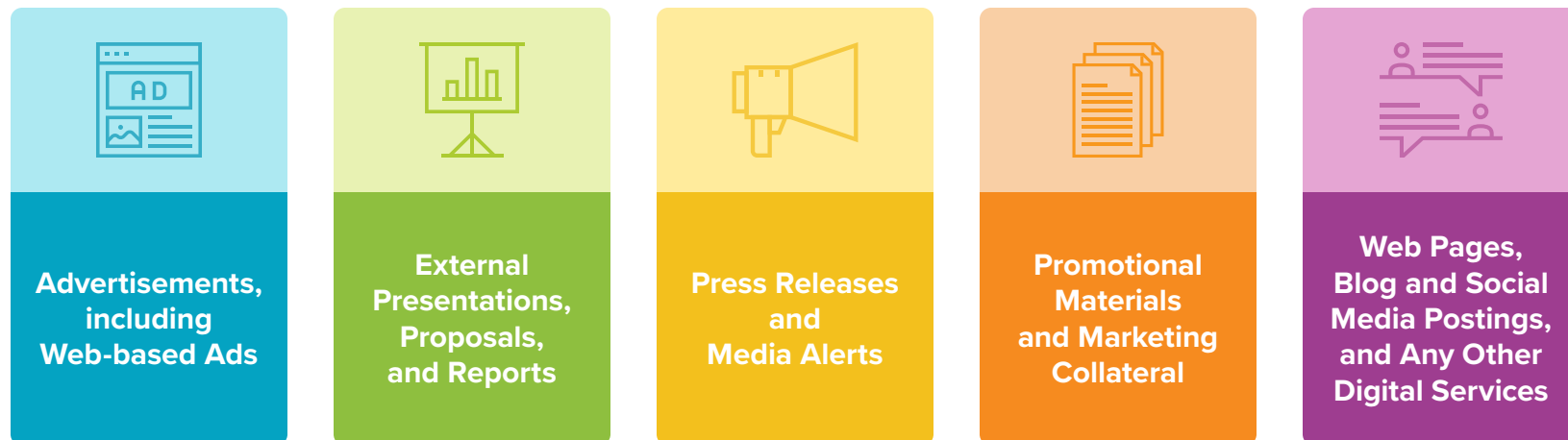
Throughout this document, you will see symbols to help you understand certain guidelines more quickly and easily.

- Indicates guidelines that must be followed.
- ✓ Indicates something that is permissible.
- ⚠ Indicates a special note, or warning.
- ✗ Indicates content that cannot be used, or something that is not permitted.

# Introduction

**IDC encourages the use of its market intelligence and licensed content for external communications purposes. However, because IDC information is copyright protected, all external uses of IDC content must have IDC's prior and express written permission.**

**External usage covers sublicensing, leasing, selling, or offering for sale IDC content, as well as any public display of IDC information, including but not limited to:**



- ✘ **IDC published research and custom documents** may not be reproduced, excerpted, reformatted, translated, otherwise repurposed, or distributed to any non-employees of your company (including suppliers, affiliates, partners, contractors, investors, customers, or reporters) without written permission from IDC. These actions constitute a violation of IDC's copyright and can result in legal action.
- ✘ **Special Note:** IDC content licensed to a client cannot be distributed by any client's partner(s) without an additional partner license. Please contact your IDC Account Manager for additional information.

To help clients maximize the value of IDC's global market intelligence and content, and to ensure that any IDC information used is accurate, current, properly sourced, and placed in a suitable context, IDC has created the following guidelines for obtaining permission to use IDC content and analyst quotes.

*Please note that additional guidelines are available for specific IDC products, such as Trackers, Multi-Client Studies, IDC MarketScape Reports, IDC Innovators, and other programs.*

## Questions?

If you have any questions about these guidelines, please contact IDC Permissions.

 [permissions@idc.com](mailto:permissions@idc.com)

 +1 508 935 4268

Or, contact your local IDC Country Manager. You may also contact your IDC Custom Solutions Project Manager if your request pertains to a custom engagement sponsored by your company.

# Obtaining Permission to Use IDC Content

## Submission Process

For permission to use IDC information, clients must submit a complete and final version of the content asset containing the IDC information in order for IDC to gauge the full context of the usage and to ensure its accuracy, timeliness, and proper attribution.

## Content Asset Formats

Content assets are most commonly submitted in a document format (e.g., press release, marketing collateral, presentation, financial filing, web page, blog entry, tweet, etc.) but may also be submitted in other multimedia formats, such as audio and video.

## Submitting Requests

Email the following information to IDC Permissions...

- 1 Intended use of IDC information
- 2 Final content asset in which it is to be used for
- 3 Source from which the IDC information was taken

 [permissions@idc.com](mailto:permissions@idc.com)

## Questions?

Questions about IDC's Content Marketing Services Content Usage Guidelines can be emailed to IDC Permissions.

 [permissions@idc.com](mailto:permissions@idc.com)

## Review and Approval

The request to use IDC information will be carefully reviewed for context, accuracy, timeliness, and proper attribution by IDC Permissions and the analyst responsible for the original research. Approvals may require additional review by the appropriate IDC Research Vice President or IDC Country Manager.

An IDC Permissions approval applies only to the content asset that was submitted for review. IDC does not issue “blanket approvals” for the use of IDC information in any content asset of a client’s choosing.

- ⚠ Each content asset containing IDC information requires a *separate review and approval from IDC*.
- ⚠ If there are any changes to the content asset after an approval is issued from IDC, the revised content asset must be re-submitted in its entirety for subsequent review and approval.

## Timing

Most permissions requests are reviewed and approved within 72 hours (2-3 business days). However, several factors can delay an approval, including the failure to include source information, the format of the content asset submitted for approval, the need to make extensive changes to the content asset, and the availability of IDC Analysts/Vice Presidents for review and approval. Note that multimedia (e.g., audio, video) review requests may take longer than document-based requests.

## Non-IDC Materials

Non-IDC materials should not mimic any IDC look and feel, or other brand elements.

**IDC reserves the right in its sole discretion to terminate or modify permission to use, display, or distribute IDC content and may request that third parties modify or delete any use of content that, in IDC’s sole judgment, does not comply with these guidelines, or might otherwise impair IDC’s rights. IDC further reserves the right to object to unfair uses or misuses of its trademarks or copyright.**

## Reprints

Reprints of any IDC custom Content Marketing Services paper may be produced by the client (up to 100 copies) and is included in the asset license. The IDC copyright must be included.

For more information about reprints, please contact IDC Sales at [sales@idc.com](mailto:sales@idc.com).

## Translations

If a client needs IDC custom content products translated into different languages, please contact your IDC Account Manager for additional asset licensing and language conversion services.

# Guidelines for Using IDC Content

## Custom Data

The following usage guidelines, regarding the use of custom data, have been created to ensure IDC maintains its position as an independent, objective, and trustworthy source of market research. Furthermore, these guidelines are intended to maximize the value our clients can realize from this research and data.

### Custom Data That CAN Be Used Externally

- ✓ **Sponsored research** that is detailed in either an IDC published/authored document or reference document (see Derivative Content), excluding vendor comparisons
- ✓ **Business value analysis (e.g., ROI)** that is detailed in an IDC published/authored document (White Paper, Spotlight, Snapshot)
- ✓ **Vendor/market neutral data** based on sponsored research that does not size, forecast, or provide vendor landscape for a newly defined market not already published in IDC syndicated research
- ✓ **Thought leadership survey data/findings** that educate the industry on important new trends but are not citing specific vendors or their related solutions (see [IDC Thought Leadership Content](#))



## Custom Data That CANNOT Be Used Externally

### ✘ Custom Market Definitions

Market data not published in IDC's syndicated research (CIS, Trackers, Spending Guides, Black Book), including but not limited to newly defined markets based on product functionality, revenue, spend, shipment, or other unit data, cannot be used externally.

This applies to:

- Market sizing
- Market forecasts
- Vendor share and revenue

### ✘ Vendor Comparisons

Sponsored research containing direct or indirect comparisons of two or more named vendors (or, implied in highly consolidated markets with a small set of well-known leaders) cannot be used externally. This includes but is not limited to:

- Vendor share and revenue
- Return on Investment (ROI), Total Cost of Ownership (TCO), or other financial measures
- Product or service comparisons
- Primary research results

### ✘ Results of primary research claiming market dominance or differentiation, compared to other vendors

### ✘ Results of primary research claiming market dominance or differentiation, compared to the remaining dominant vendors that make up the majority of the remaining market

### **IDC MarketScape Excerpts (Special Note)**

IDC MarketScape Excerpts that are licensed by a client and created by Custom Solutions do not allow limited vendor comparisons within the graphic of the deliverable and the context of the paper.

- ⚠ The IDC MarketScape Excerpt only allows for one featured vendor in the Excerpt and there is no client input or editorial direction allowed in the development of the Excerpt.
- ⚠ The IDC MarketScape Graphic can be used separately from the Excerpt to drive traffic to the full MarketScape document if licensed by the client.

### **How to Source IDC Custom Data for External Use**

Custom data being used externally must reference an IDC published/authored document or reference document (see Derivative Content).

IDC custom data that is sourced to IDC must be accurately sourced, including the name of the sponsor. The standard format for IDC source information is:

*IDC Document Type, Sponsored by Vendor X, Title of Document, Doc. #xxxxxx, Publication Date (Month Year)*

IDC custom data that is leveraged to develop independent analysis can be sourced using language similar to:

*“analysis and model developed by [Vendor] using data from IDC”*

- ⚠ IDC custom data leveraged to develop independent analysis requires written approval from a Vice President within IDC’s Custom Solutions Team and must be validated by IDC Permissions.

For all marketing approval of MarketScape Excerpts or graphic usage prior to promotion, please contact IDC Permissions.

✉ [permissions@idc.com](mailto:permissions@idc.com)

## IDC Content Marketing Services Content

### Using Syndicated Research

- The content to be used must have been published by IDC *within the last 12 months*. Forecast and market-share data must come from the most recently published updates.
- The content to be used must have been published by IDC in a research document available on IDC.com.
- All IDC information used must be properly sourced in the client's content asset. The standard format for IDC source information is:

*IDC Document Type, Sponsored by Vendor X, Title of Document, Doc. #xxxxxx, Publication Date*

### Using Sponsored Content

- For IDC Content Marketing Services products and papers, the source must include the name of the sponsor, as follows:

*IDC White Paper, Sponsored by Vendor X, Title of White Paper, Doc. #xxxxxx, Publication Date*

Alternative examples would also include:

*IDC InfoBrief, Sponsored by Vendor X, Title of InfoBrief, Doc. #xxxxxx, Publication Date*

- ⚠ Excerpts of IDC content must be taken verbatim from an IDC source and must be used in a context that does not alter or distort the excerpt's original meaning. Excerpts longer than a few sentences may require separate licensing fees.
- ⚠ Client content assets, including press releases, marketing documents, blogs and other web postings, and advertisements containing direct comparative information about its competitors will be scrutinized for accuracy and context, and may be refused.

Some exceptions are made to this standard. For more details, please contact IDC Permissions.

 [permissions@idc.com](mailto:permissions@idc.com)

- ⚠ Combining IDC data from separate forecasts will receive close examination and will likely be refused.
- ✘ Comparative information derived from custom projects, inquiry, or other activities outside the standard program published deliverables on behalf of all program clients will not be approved for external use or distribution.
- ✘ The use of “IDC” in the subject line of a client or third-party email is not permitted.

## Digital Content

IDC Digital Content includes all custom deliverables that are hosted by IDC online and provided via a unique URL. Examples include...

- iViews
- Lead Generation Tools
- Interactive Selling Tools
- Business Value Snapshot Tools
- Digital Papers
- Videos

As with other sponsored content, IDC Digital Content products are licensed assets with a set license period, during which they are available for public use. At the end of the license period the content will no longer be hosted, unless the license period is renewed.

- Standard IDC URLs are secured and deployed for Digital Papers and Digital MarketScape Excerpts, and belong to IDC as part of the license period.
- Specialized domain name purchases for iViews and Lead Generation tools are secured by IDC for the duration of the license period. The domain is transferable to the client at the end of the normal 12-month license if a client chooses to use it for purposes not associated with IDC.

→ Video content developed by IDC will be delivered via embed code for all projects unless stated otherwise in the statement of work. Clients can use this embed code to deliver the IDC video to any audience they choose per the contract.

⚠ Clients are not authorized to edit or cut any IDC video without prior approval or permission from IDC.

⚠ All landing pages where the video will be displayed need to be sent to IDC Permissions for prior approval before going live.

IDC encourages clients to develop marketing assets to support and drive awareness of IDC Digital Content. All marketing support collateral is required to be submitted to IDC Permissions for approval and verification before final use.

→ Clients may quote from IDC Digital Content, provided the reference is not part of any dynamic output. References must be approved by IDC Permissions.

⚠ All performance marketing insights and analysis provided are in the aggregate and for internal use only.

✘ IDC does not allow the creation of Derivative Content based on the output of Digital Content as this content is dynamic and based on individual inputs.

## Analyst Quotes

**Analyst quotes must be accurate, objective, complete, and relevant to IDC's most recent data, analysis, and opinion.**

→ In situations when the quote is derived from an IDC research document, the quote attributed to an IDC analyst should be used in full context so that the meaning is not misconstrued.

- The quote should address market needs, customer requirements, or technology developments in the analyst's area of expertise.
- An IDC Analyst's official title must accompany their name.
- ⚠ All analyst quotes must be reviewed and approved by the analyst being quoted. In many cases, the quote must also be reviewed and approved by an IDC Vice President. If the quoted analyst is unavailable for review within the client's timeframe, the quote itself will not be approved.
- ✘ The quote will not promote a company or a product, as this is the role of the client spokesperson. Similarly, negative or cautionary comments regarding a vendor cannot be leveraged by a competitor in any form.

## Figures & Graphics

Clients using an IDC figure must use it exactly as it appears in the published document. Clients may not display a subset of the vendors or markets shown.

- A figure showing IDC's ranking of market-share position (e.g., #1, #2, etc.) may be allowed by the Vice President from the research group that published it.
- ✘ IDC's Executive Forecast graphic cannot be used externally.
- ✘ When displaying IDC figures or graphics, the market name may not be changed or modified in any way.
- ✘ When displaying IDC figures or graphics, the title describing a figure may not be changed or modified.
- ✘ When displaying IDC figures or graphics, the units, columns, rows, axes, labels, legends, etc., may not be changed or modified in any way.

The use of IDC figures and graphics may involve separate licensing fees. For more information, please contact your IDC Sales Representative or IDC Permissions.

 [permissions@idc.com](mailto:permissions@idc.com)

# Guidelines for Using IDC Content in Press Releases and Social Media

## General Guidelines for Press Releases

All press releases containing information from an IDC white paper, InfoBrief, eBook, or iView are subject to IDC's prior review and approval.

→ The preferred descriptions of IDC in the body of a press release are as follows:

*IDC, a leading provider of global IT research and advice,...*

*Leading IT market research and advisory firm IDC...*

⚠ To avoid the appearance of a joint press release, the use of IDC's corporate boilerplate content in client press releases is not permitted without the prior approval of IDC's Corporate Communications Team.

✘ The use of "IDC" in the headline and sub-headline(s) of press releases is not permitted. The only exceptions to this rule are those focused on custom sponsored Thought Leadership programs (see next page), IDC MarketScapes and IDC Innovator research reports. Acceptable alternatives include...

*"Leading Analyst Firm," "Market Research Firm," etc.*

## Types of Acceptable Press Releases

There are generally two types of press releases that IDC will review and approve for custom sponsored content:

- 1 Those that reference a sponsor's products or services (e.g., custom content and self-assessment tools for lead generation).
- 2 Thought Leadership programs that do not mention vendor products/services.

### IDC Custom Content Containing Reference to Sponsor's Products or Services

IDC understands that custom content (notably, IDC White Papers, InfoBriefs, Spotlights, eBooks, and other documents, microsites and assessment tools) will often be used within a campaign or product introduction. IDC supports client use of IDC custom content to promote your products in your marketing and branding efforts. To this end, IDC provides an array of products and services designed to help our clients use IDC custom content and tools effectively.

However, since IDC does not believe that the availability of custom content is a newsworthy "event" in itself, IDC has formal policies on the use of IDC custom content in press releases and press events.

- Press releases should focus on the Client's product or service, *not what IDC wrote or says about it*. As such we would expect that any reference to IDC custom content in a press release will be brief and secondary to the Client's primary message. As a rule of thumb, less than 20% of the press release content should refer to IDC, analyst statements, or custom content.
- When cited, the custom content should be referred to as "an IDC White Paper, Technology Spotlight, etc., sponsored by Client." *Custom sponsored content cannot be*

## Review & Approval

All press releases must be reviewed and approved by IDC Permissions prior to being made public. Draft copies of the press release should be sent for review, comments, and approval to:

 [permissions@idc.com](mailto:permissions@idc.com)



*positioned as an IDC “report”* (as this creates confusion with IDC’s independent research reports) and a clear reference to client sponsorship is required.

- Any press release mentioning IDC custom content should clearly state in the headline and lead paragraph the client/sponsor company name, so it does not look like an IDC-issued press release.
- ✘ “IDC” or the title/name of the custom content cannot appear or be referenced in the headline or sub-headline of the press release.
- The full IDC boilerplate cannot be used in these releases. However, clients may use the following should they wish to further describe IDC:

*International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. IDC helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. For additional information on IDC, please visit <https://www.idc.com>.*

- ⚠ Related promotional activities and events should be discussed with the appropriate IDC Vice Presidents and require IDC permission. These may require additional fees.
- ✘ An IDC media contact cannot be included in the press release.
- ✘ IDC will not participate in press-only events that focus on results achieved in custom content projects, unless they fall in the category of “Thought Leadership”.

### **IDC Thought Leadership Content (vendor & product/service neutral)**

For IDC thought leadership content, such as white papers, InfoBriefs, eBooks and iViews, that is relevant to entire categories of products and services in a market segment and do not reference any content specific to the sponsor or its products and services, IDC will allow sponsors to issue press releases announcing these findings subject to the following guidelines and IDC’s review and approval.

- The focus of the press release must include a brief summary of the core content, key findings, and include a link to the core asset hosted on the sponsor's website.
- The press release must be market-focused, emphasizing the general findings from the IDC custom survey or research.
- The press release must be neutral regarding the sponsor's products and/or services. No mention of the vendor's products, services or customers will be allowed outside of the corporate boilerplate at the end of the release.
- Quotes from representatives of the sponsor will be allowed, provided these comments are also focused on the research findings and not used to promote a product or service.
- Quotes from an IDC Analyst or Consultant are allowed but must focus on the research findings and cannot promote the sponsor's products, services or customers.
- The press release must include a description of the research methodology that meets IDC's satisfaction regarding scope, method, and meaning. IDC will have the final say on any qualifying statements that must be included in the press release to ensure that the study's findings and methodology are properly characterized.
- The press release must clearly identify the IDC product as a white paper, InfoBrief, eBook or iView and must include the name of the sponsor. Full source information should be formatted as follows:

*IDC Document Type, Sponsored by Vendor X, Title of Document, Doc #xxxxxx,  
Publication Date*

- ⊗ References to an IDC "report" will not be allowed as this does not sufficiently distinguish between custom sponsored research and IDC's independent proprietary research.
- ⊗ IDC is not to be named in the headline or sub-headline(s) of the press release. Sponsors should use variations of "Leading Market Research Firm" or "Technology Analysts" in the headline and sub-headline(s) to identify IDC.

- ✘ The IDC boilerplate cannot be included in the press release.
- ✘ An IDC Spokesperson or analyst will not be listed on the press release as a point of contact.

## Guidelines for Social Media

The use of IDC information in online and social media applications, including but not limited to blogs, Facebook, LinkedIn, Twitter, Instagram, Wikipedia, and YouTube are subject to the same guidelines outlined in this document. For example, “IDC” may not be used in the names of Facebook pages, LinkedIn Groups, or Twitter handles or hashtags without prior approval by IDC. These uses are always reserved for IDC-led initiatives.

IDC recognizes that “conversations” between and among individuals and organizations continue to evolve and leverage a growing number of social media platforms. IDC distinguishes between “commenting” on, or “tweeting” about, an IDC deliverable versus “commenting” on, or “tweeting” about, the contents of the deliverable. The latter always requires prior permission from IDC, as with any form of external content use unless the information has been directly released to the public by IDC in the form of a press release or a tweet from the IDC corporate handle @idc or other authorized IDC analyst or representative.

### Examples

- ✔ Tweeting that IDC’s latest server tracker numbers just came out and perhaps linking to an IDC document or press release does not require permission.
- ⚠ Tweeting about the latest server tracker results (e.g., “XYZ vendor is #1!”) requires prior permission from IDC unless this information has been directly released to the public as described above.

## Establishing a Social Media Presence

Any use or reference to IDC when establishing a social media presence (e.g., setting up a Facebook page, Blog, Twitter profile, etc.) requires prior approval from IDC.

# Guidelines for Using the IDC Logo

## Who Can Use the IDC Logo

- IDC customers who license IDC content or utilize IDC speakers for external speaking engagements such as, Webcasts, Onsite Speaker Events, etc.
- IDC clients, their channel partners, and any media companies that may be appointed by IDC clients

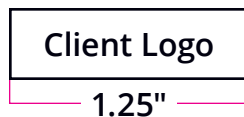
## Where the IDC Logo Can Be Used

Use of the IDC logo is permissible in the following two ways:

- 1 on websites
- 2 on assets created by clients

### On websites to promote an analyst speaker at a live or webinar event

- The IDC logo should be at maximum 2/3 the size of the client logo.



## Obtaining Permission

**Use of the IDC logo is not permitted in client materials without express consent from IDC.** For permission to use the logo and to receive a copy of the logo usage guidelines, please contact IDC Permissions.

✉ [permissions@idc.com](mailto:permissions@idc.com)

## Download IDC Logos

[Full Color](#)

[Gray](#)

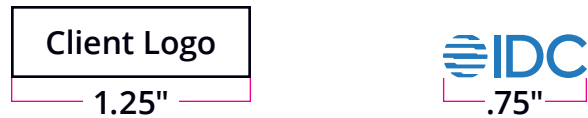
[White](#)

[All other IDC logo files](#)

- ✘ There cannot be any reference to “in partnership” or similar language.
- The IDC logo should be placed at the speaker level.
- ⚠ The IDC logo cannot be used in the header of any webcast or live speaking event *unless pre-approved by IDC Permissions*.

### On client created assets

- The IDC logo should be at maximum 2/3 the size of the client logo.




- ✘ There cannot be any reference to “in partnership” or similar language.
- Both client logo and IDC logo should be separated to the far left- and right-hand side of the document to reduce reader confusion of authorship.

For full details on the IDC Logo Usage, please refer to the [IDC Corporate Logo Guidelines](#) document.

## Questions?

If you have any questions about these guidelines, please contact IDC Permissions.

 [permissions@idc.com](mailto:permissions@idc.com)

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