IDC's Global White Paper Guidelines

OVERVIEW

IDC's trusted and independent IDC White Papers are successfully used by IT vendors, to educate end users about solutions, best practices, future market developments and products. In addition, third party organizations (governments, NGOs, IT associations, etc.) commission them for promoting IT market initiatives. Our customers value IDC White Papers because of their credibility — owing to our insight, independence and balanced opinion.

IDC is unsurpassed for insightful, authoritative, and objective analysis and commentary. Whether an organization is in the early stages of market development or is seeking to broaden its customer base, IDC can deliver its message to a qualified and receptive audience. With a variety of programs and initiatives supporting white paper launches, IDC can help organizations achieve a superior return on their marketing investment.

IDC leverages its existing research and expertise to develop white papers in cooperation with sponsoring clients. IDC White Papers are original documents that are typically used as part of an integrated marketing communications campaign. For some white papers, IDC conducts specific primary research (surveys or case studies) to develop a market-driven perspective on the topic. This allows the client or IDC to position the sponsor's offering within the context of this research.

Sponsors are encouraged to provide critical guidance, input, and review throughout the process of creating the research and analysis. Our objective and rigorous editorial and research stance includes providing descriptions of methodology, challenges, and acknowledgement of white paper sponsorship.

WHITE PAPER GUIDELINES

White papers are a high profile document that will typically receive wide attention and circulation. It is therefore of paramount importance to the ongoing credibility of IDC that these documents are of the highest quality in terms of content, presentation and quality. White Papers are, therefore, subject to a number of specific rules and guidelines.

Content

- IDC's single-sponsored white paper projects typically deploy our industry knowledge, analyst evaluation and recommendation, business value assessment (e.g., ROI), primary research, case studies to create strong, objective, and balanced statements as well as featuring clients products and services

Competitor Review

- IDC policy for *Product White Papers* forbids direct head-to-head comparison of a client and its products against competitors' and their products or services in this market segment. Competitors might include a named vendor(s), technology, platform, standard, category, or group.

Recommendation

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- The white paper will explain the market and technology issues and describe the client's approach, but cannot directly recommend customer purchase of the product.

Market Share Data

- Market share data can be reported in a white paper if it has been previously published in a syndicated IDC service, multiclient study, or Tracker. The use of this market share data is subject to IDC rules of use for these services. Market shares ***cannot*** be created specifically for a white paper project.

Use of Primary Research

- Every white paper project that includes primary research will have a detailed methodology section to clarify the scope and scale of the research study. When a case study methodology is used, the number of interviews and how respondents were chosen will be described (e.g., respondent names provided by vendor). IDC can include direct quotations of case study subjects in the white paper at its discretion and with the permission of the subject (if they are to be identified by company). IDC reserves the right to paraphrase case study subject statements to preserve a tone consonant with IDC's own opinion.

Challenges

- All White Paper that feature the clients products in any way must include a "Challenges" section, which highlights the barriers and challenges the vendor faces. The Challenges section isn't mandatory for market based content, but is encouraged and final inclusion or not will be agreed with the appropriate manager.

Independence

- IDC will work closely with the sponsor in designing the focus and parameters of the document content. However, IDC has final editorial review of the white paper's content especially regarding the opinions expressed regarding IT markets, technology adoption, and products.

Peer Review

- All white papers and case studies will be reviewed by the superior of the primary author and are subject to the final approval of an IDC Vice President responsible for reviewing white papers across all research areas within his/her geographic region. Centralizing the review process within each geographical region will ensure consistency in the structure and quality of the white papers.
- White papers covering multiple countries or regions will need sign-off by management and must allude to the fact that some details may differ in other geographies
- White Papers will go through the approved editing process that all published research is subject, to thus ensuring highest quality communication and visual quality.

Formatting & Licensing

- A white paper is typically between 8 to 12 pages in length, but this can vary.

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- It is IDC policy that the white paper sponsor be explicitly identified on the front page of the final document - e.g. "An IDC White Paper Sponsored by *Client Name*." The white paper and each profile will also show a date of publication on the document as outlined in the template.
- As part of the editorial policy, IDC recommends against the use of copyrights, trademarks and servicemarks within the document. IDC further strongly discourages the use of client logos within the document, again to preserve editorial objectivity.
- IDC White Papers will not have embedded links to vendor collateral.
- The standard licensing period for a white paper is 12 months, but can be extended upon agreement and additional fees may be required.

SUMMARY

Research and Analysis IDC uses in White Papers	**Research and Analysis IDC *<u>does not</u>* use in White Papers**
IDC analysis of the Client's market' wants and needs, Client's offering, how offering creates value in its market, challenges the Client faces, and a summary opinion	
Comparison of Client vs. "All other" products (as one class)	Comparison of Client vs. "Named Other" products (brands, technologies, platforms, standards, groups)
Market share and forecast data from previously published IDC syndicated reports, multiclients, and Trackers	Use of custom market share and forecast data created as part of a single-sponsored project for a Client
ROI comparisons, i.e., calculation of business value delivered by the use of Client's product	Calculations of TCO i.e., comparing the relative costs and value of 2 or more products, platforms, technologies, or groups (unless an upgrade)
Primary research that illustrates market issues and needs and case studies that illustrate value derived from Client's product	Primary research or case studies that compare the client products to other products and services

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Press Release Guidelines Relating to White Papers

IDC understands that the white paper might be used in conjunction with a campaign or product launch and as such provides an array of products and services designed to help organizations use the white paper effectively. However, IDC has specific rules on PR use and IDC involvement.

- When cited, the white paper should be referred to as "an IDC White Paper sponsored by *Client*". It should ***not*** be positioned as a "report."
- "IDC" nor the white paper should appear or be referenced in the heading or subtitle of the press release.
- The full IDC boilerplate should not be used in these releases. However, clients may use the following should they wish to further describe IDC:

  IDC is the foremost global market intelligence and advisory firm helping clients understand technology and e-business trends to develop sound, action-oriented business strategies. For additional information on IDC, please visit www.idc.com.

- An IDC media contact must ***not*** be included in press releases so as not to give the impression that it is a joint release by IDC.
- IDC needs to have final review and the release must be signed-off by the person at the most senior level within the author's product group (Group VP or higher) as well as corporate marketing.
- Related promotional activities and events should be discussed with the appropriate IDC VPs and require IDC permission. These may require additional fees.
- IDC is able to participate in press launches, subject to internal sign-off, for white papers supported by specific research that exclusively focus on markets and do not contain any reference to sponsor's products.

RE-USE

- White Paper content can be re-used in other media (brochures, advertising) with IDC's written permission and may incur additional fees. The above Guidelines apply to these situations.
- Email and website distribution of IDC-provided content in IDC-provided format through 3rd parties, including partners and media properties, requires a separate license.
- Any IDC information or reference to IDC that is to be used in advertising, press releases, or promotional materials requires prior written approval from IDC. For permission requests, clients need to contact permissions@idc.com. Translation and localization of a document requires an additional license from IDC.

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