

Web-Site Globalization

The Next Imperative for the Internet 2.0 Era

An IDC White Paper Sponsored by eTranslate Inc.

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Executive Summary

This IDC white paper, sponsored by eTranslate Inc. (www.etranslate.com), examines the worldwide expansion of the Internet and the resulting urgency of Web-site globalization in the new Internet 2.0 era. In a world where IDC predicts that Internet spending outside the United States will exceed \$914 billion, two-thirds of the projected worldwide ecommerce total of \$1.64 trillion by 2003, effective Web-site globalization is the next imperative of Internet enterprises. As later defined, effective Web-site globalization is far beyond the simple translation of text and images or the addition of multilingual support. It encompasses true localization of a Web site, which includes relevant local content, cultural sensitivity, regional preferences, and regulations. To reach IDC's "gold," or optimal, stage of Web-site globalization, companies must balance local flexibility with centralized control, thus ensuring an overall technical infrastructure, a consistent look and feel, and core Web content and objectives.

In Part One of this study, IDC addresses the shifts in global Web usage and quantifies the vast opportunities worldwide ecommerce offers on a regional basis. This analysis is based on both our latest *Internet Commerce Market Model (ICMM 6.2)* and *Project Atlas II Initiative*.¹ IDC's key Internet projections include the following:

- By yearend 2003, the United States will account for less than one-third of the World Wide Web user base total of more than 602 million, down from nearly half at yearend 1999.
- Western Europe and Japan, projected to collectively grow to \$764 billion or almost 47% of all ecommerce revenue in 2003 from just 28% in 1999, will lead the international ecommerce charge.

¹ As a follow-up to *Atlas I* in late 1998, IDC's *Atlas II* project surveyed 29,000 Web users from 100+ countries in late 1999 on their Web usage and purchasing; it is the world's largest Web-based survey.

“If you are in the software or Internet market, you don’t have a choice but to globalize. About one-half of your potential market is outside the U.S. If you don’t globalize, you are leaving one-half of your money on the table.”

— Mary Ann Walsh, Vice President,
Macromedia

- Worldwide business-to-business (B2B) purchases are projected to ignite the Internet, rising from \$96.9 billion in 1999 to \$1,431.1 billion, or 87% of all worldwide ecommerce by 2003. IDC projects global business-to-consumer (B2C) ecommerce to grow from \$33.5 billion in 1999 to \$209.1 billion by 2003.

Part Two of this white paper, based on more than a dozen in-depth telephone interviews with corporate Web executives and case studies, identifies the driving forces behind Web-site globalization and localization from the project manager’s perspective. From the analysis of firms like Macromedia, Kodak, Cisco, the National Retail Federation (STORES.org), Dell, and Charles Schwab, IDC provides compelling case study summaries of primary benefits, issues, return on investment (ROI) results, and lessons learned directly from leading corporations that have already successfully undergone Web-site globalization.

The Web is quickly breaking out of its U.S.-centric and English-only cocoon. As evidenced throughout this white paper, to *not* internationalize today is simply no longer an option in the Internet 2.0 era. The lost opportunity costs are already too great, and they are increasing with each passing quarter. Explore the critical drivers and issues of Web-site globalization outlined in this important and unique IDC white paper. Consider your company’s current Web-site strategy and how well it’s positioned against the worldwide Web usage shifts and international ecommerce markets. Is *your* enterprise ready for the globalization of the Web? IDC mandates Web-site globalization should be *the* prime directive for any online organization today: The time to think and act globally is *now*.

Web Expands Worldwide, U.S. Role Diminishes

“The World Wide Web is going global and fast,” states Barry Parr, director of IDC’s Internet and eCommerce Strategies Research program. “We expect Internet usage and commerce, both in the United States and internationally, to continue on aggressive growth trajectories through the next five years,” Parr notes. Overall, IDC estimates the number of worldwide users accessing the Internet will more than double from 239 million in 1999 to more than 602 million in 2003, according to IDC’s *ICMM 6.2*.

Heavy overall growth continues everywhere, but regional shifts are occurring rapidly within the Web universe of users and ecommerce in both the B2B and B2C segments. The United States in particular is quickly losing its dominance on the Internet and thus represents a

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Internet Users Increasing Preference of Non-English

IDC conservatively predicts 36% of all Internet users by 2003 will prefer to use a language other than English, up from 28% in 1999. The user preference for non-English on the Web by 2003 by region will be as high as:

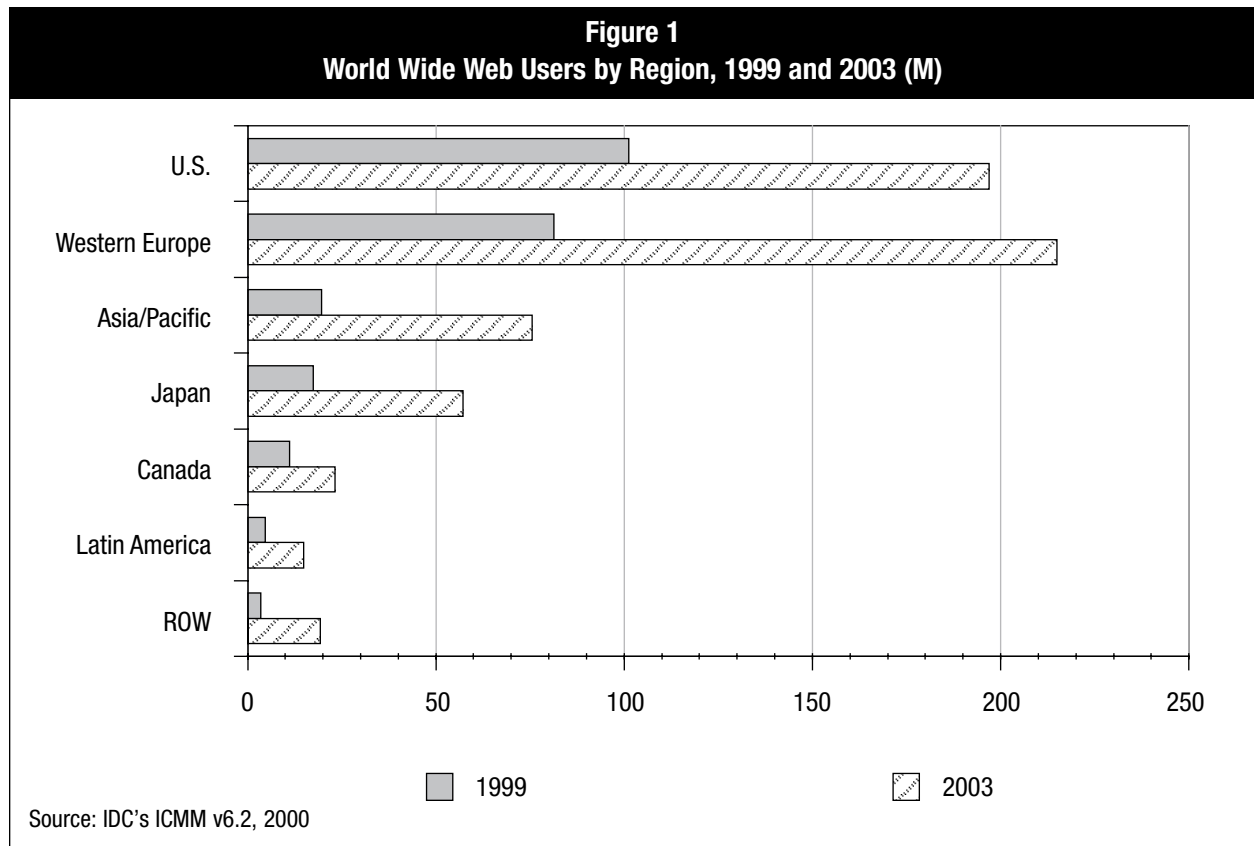
- 84% in Japan
- 75% in Latin America
- 52% in Western Europe

Internet consumers are also up to four times more likely to shop and purchase online from Web sites that support their native language.

— IDC's Project Atlas II Initiative

diminishing piece of the World Wide Web, as measured in both usage and ecommerce. By yearend 2003, the United States (197.2 million users) will account for less than one-third of the worldwide user base total, down from 42.4% (101.5 million users) at yearend 1999 based on IDC's ICMM 6.2 projections. As later detailed, the U.S. minority Web user share (32.7%) will still account for more than 44% of the world's Internet commerce revenue in 2003.

Conversely, Web usage within key international markets continues to expand at a breakneck pace, as detailed in Figure 1. Web user growth is fastest in the Asia Pacific region, where IDC predicts it will more than triple from 19.7 million in 1999 to 75.6 million in 2003. However, by sheer user volume, Western Europe is expected to outstrip the United States as it expands from 81.4 million users at yearend 1999 to more than 215 million users, or about 36% of worldwide users, in 2003.



“Propelled by a broader interest in the Web and the recent adoption of a single common currency [the Euro] across the region, Western Europe is emerging as a hot spot for ecommerce,” says Anna Giraldo Kerr, senior analyst with IDC’s Internet and eCommerce Strategies Research program. “The Internet in Western Europe is quickly moving

from a ‘technophile’ phenomenon to a tool for the entire population,” she adds. In addition, the IDC research program also notes a wide diversity in Western Europe Web user penetration rates:

- **Northernmost countries** (e.g., Finland, Sweden, Norway, and Denmark) have the highest online penetration rates, up to 30%+, and most closely mirror the United States.
- **Central band countries** (e.g., United Kingdom, the Netherlands, and Germany) occupy the middle-tier penetration group hovering around the mid to upper teens.
- **Southernmost countries**, including Greece, Italy, Spain, and Portugal, follow with online penetration rates typically well under 10%, with some less than 5%.

Western Europe and Japan Lead Global eCommerce Growth

Following Web usage, ecommerce is also no longer a U.S.-centric phenomenon. The United States commanded 62%, or \$80.5 billion, of the total \$130.5 billion in Internet spending in 1999, according to IDC’s *ICMM*. Despite a predicted spike to more than \$726 billion, the U.S. share of the global ecommerce market will drop to just 44% by 2003. At the same time, IDC expects that Internet spending outside the United States will surge to exceed \$914 billion, or fully two-thirds of the projected global ecommerce total of \$1.64 trillion, by 2003. Leading the international charge in ecommerce are Western Europe and Japan, which are projected to explode to \$511 billion and \$253 billion, respectively, in 2003, as shown in Figure 2. Largely at the expense of the United States, these two major regions will collectively grow to almost 47% of all ecommerce revenue in 2003, up from just 28% of all Internet sales in 1999.

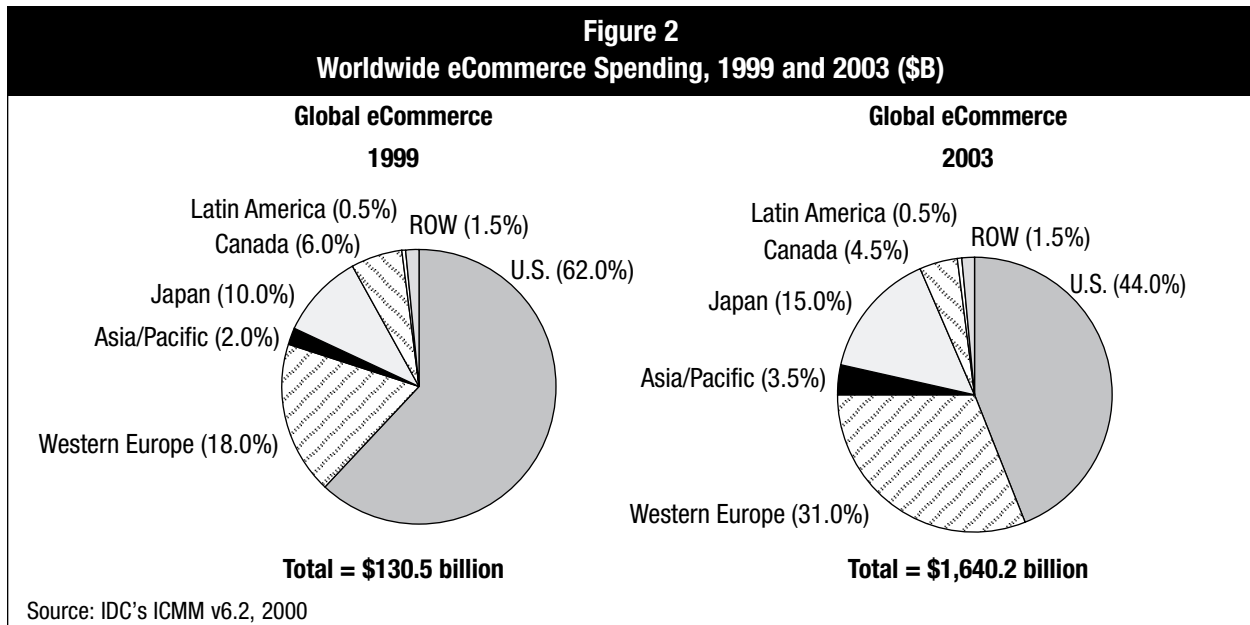


Table 1 reveals the breakouts and the important shift within Internet commerce toward the B2B model and away from B2C ecommerce. IDC projects global B2C ecommerce to grow from \$33.5 billion in 1999 to \$209.1 billion in 2003. Worldwide B2B purchases online are projected to ignite the Internet, growing from \$96.9 billion in 1999 to \$1,431.1 billion — or more than 87% of all worldwide ecommerce — by 2003.

Table 1
Global eCommerce Revenues: B2B and B2C Regional Breakdowns, 1999 and 2003 (\$B)

	U.S.	Western Europe	Japan	Asia/Pacific	Canada	Latin America	ROW
B2B 1999	54.2	20.8	11.64	1.7	6.6	0.3	1.6
B2C 1999	26.3	3.6	1.8	0.5	1	0.1	0.2
B2B 2003	607.1	470.8	236.3	33.6	56	6.4	20.7
B2C 2003	119	40.2	16.8	17.7	8.4	1.6	5.2

Source: IDC, ICMM v6.2

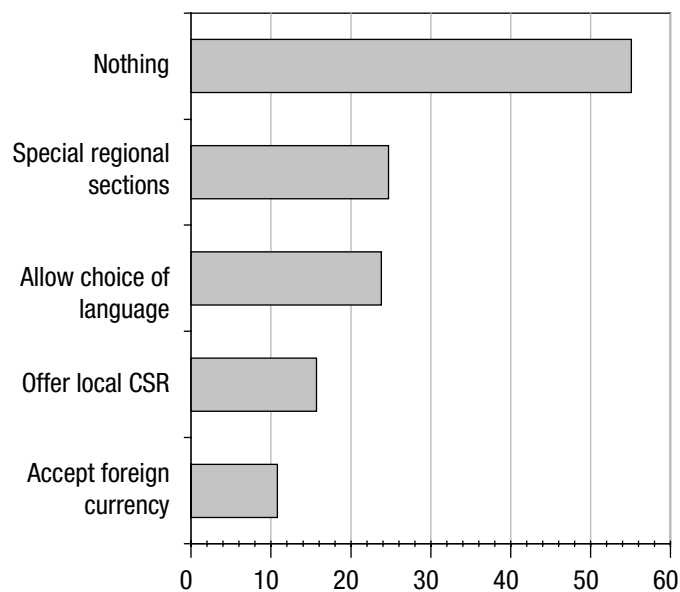
The Importance of Web-Site Globalization in the Internet 2.0 Era

To date, IDC has tracked a corporate hesitation toward Web-site globalization in the United States (see sidebar, “Today’s U.S. Web-Site Conundrum”). Given the difficulties of multilingual Web sites and the complicated cultural issues regarding localization, “this is understand-

Today’s U.S. Web-Site Conundrum

Despite the vast international opportunities projected, few U.S. companies appear poised to take advantage of them (see Figure 3). More than half (55%) of U.S. companies do nothing to customize their Web sites for foreign visitors; less than one-quarter even allow a choice of language, according to recent IDC Internet Executive ePanel research. With such minor globalization efforts, it is not surprising that 72% of U.S. companies that are online currently draw only 10% or less of their ecommerce revenue from outside the United States.

Figure 3
Top 5 Internationalization Efforts
Among U.S. Companies’ Web Sites (%)



N = 651 respondents from B2B and B2C companies in 4Q99.
Source: IDC, 2000

However, IDC ePanel results also showed that adding features that internationalize a Web site (e.g., multilingual capability, special sections) drives significant increases, up to three times, in foreign ecommerce revenue. The message? U.S.-centric Web-site complacency in the global Web era will increasingly cost in lost opportunities.

Enterprises must globalize now to leverage optimal Web success.

“Global companies are by necessity publishers of multilingual content.”

— Donna Soave, Manager,
Global Information Connection,
Cisco Systems Inc.

able,” comments Donna Soave, manager, global information connection at Cisco Systems Inc.

However, to not internationalize today — the equivalent of sticking your Web site in U.S.-centric sand — is no longer an option. “Global companies are by necessity publishers of multilingual content,” states Soave. She explains that Cisco has taken a hybrid Web globalization approach: A centralized model is used for the overall Web infrastructure for control but with a very decentralized approach regarding local content for greater flexibility. In this way, and according to the Cisco model, “everyone spearheads the Web site,” concludes Soave. For Cisco (www.cisco.com), which now offers multilingual support for 56 countries, the results speak for themselves. Touting its tag line as “worldwide leader in networking for the Internet,” Cisco knows the importance of reaching international markets quickly and easily. With FY99 revenues of \$12.2 billion, up 43% from \$8.5 billion in 1998 and \$69 million in 1990, and with 84% of its orders transacted via the Web, Cisco is one of the most successful ecommerce sites on the Internet.

“Given the rapid international shifts in both Web usage and ecommerce in the emerging Internet 2.0 era, *now* is the time to think and act globally,” advises IDC’s Parr. “IDC views the next 6 to 24 months as *the* crucial period for corporations to plan and implement strong Web-site globalization strategies.” As Web history has shown, the “first-to-market” advantage prevails; the quick and agile win, while those who lag, lose. As part of a comprehensive plan to globalize, corporations must now address strategic and tactical issues such as which international market(s) to target first and what kind of multilingual support is required. Further, enterprises must also assess their optimal approaches for Web-site globalization in such areas as:

- Performance
- Maintenance
- Control (centralized vs. local)
- Content integrity

Though most companies agree that a gradual or phased-in plan toward multilingual coverage may be ideal, a preemptive catalyst often forces companies into Web-site globalization. As Quokka’s Business Development Manager, Marc Sondheimer explains, “The event [the America’s Cup sailing races, February–March 2000] was the real motivator for us.” Under a contractual partnership agreement signed in late 1999 with Terra Networks and Yahoo! Europe, Quokka (www.quokka.com) was required to set up a process in less than three weeks to create, post, and distribute America’s Cup race news in Spanish, Italian, and German. “Outsourcing was the only quick way to ramp up and offer foreign coverage for the America’s Cup,” concludes Sondheimer.

Originally launched in February 1995, Kodak.com daily traffic doubled from December 1998 to December 1999. Now supporting an average of 22 localized country sites, Kodak.com receives more than 3 million hits from 60,000 visitors in more than 100 countries every day.

“Because the Web is a marketing channel first and foremost, it’s a language issue — a communication issue — to be able to deliver a marketing message to people. If they don’t speak English as their primary language, we need to communicate in their language.”

— Terry Lund, Director of Internet Strategy, Kodak

Finally, CIOs and Web executives must assess where to access the localization expertise needed to deal with the myriad of technical, organizational, and cultural challenges presented by a global market and multilingual sites and services. Most firms IDC interviewed remain the drivers of content development and the site’s look and feel, but most completely outsource the actual translation and localization process to a firm that specializes in Web-site globalization.

The Internet, as both a key driver and unifying global platform, is fast changing the translation services industry. Web sites such as www.etranslate.net are also being launched to serve the translation services industry with features including current news, globalization tool reviews, access to translator networks, and other useful links (e.g., international dictionaries, dialing codes, and currency, time, and date converters).

Leveraging Local Partnerships for Optimal Localization and Cultural Fit

Industry experts and successful user firms alike strongly recommend taking a local partnering approach in Web-site globalization. “Taking the time to find the right partners is essential because they will open doors in the region as your ambassador,” advises IDC’s Kerr. Connecting with onsite vendors, consultants, and even national employees is the most potent way to gain insight and access into a new target market. This approach helps firms establish an instant local presence with credibility.

Perhaps most importantly, it enables effective localization far beyond the simple translation of text and images through the addition of relevant local content and the best natural adaptation or fit to cultural nuances, regional preferences, onsite technology, and even local slang. Companies must also consider general basics of Web-site globalization, such as clear and standard usage of date, time, and measurements; adherence to local regulations; and localized payments or currency conversion links. Cultural sensitivity — everything from color, fonts, and humor to cognitive approaches, values, and group versus individual mentalities — is what generally makes or breaks an effective, globalized Web site.

As IDC’s Parr reminds us, “The best globalized Web site doesn’t hint that it has been translated or localized at all. Rather, it’s transparent with the look and feel as if it were originally written and designed in and for the target language and culture.” Achieving a well-designed and effective globalized Web site encompasses many factors: from language translation, business, regulatory, and technical skills to creative design, value-added service, and cultural expertise. Most often, Web-site globalization is best left to the experts that specialize in Web-based globalization solutions with plenty of local human support.

Corporations Cite Reasons for and Benefits of Web-Site Globalization

“The Web is a key channel for reaching the end users of our products. Like many large manufacturing firms, Kodak sells virtually all of its products through distribution channels, so we have a difficult time getting close to the customer. The Web is a tremendous vehicle for allowing us to do that, to get direct feedback from the customers and understand what they want from Kodak, from the Web site, from our products. It’s a tremendous opportunity to interact with our customers.”

— Terry Lund, Director of Internet Strategy, Kodak

Project managers have shared many reasons why corporations make the leap to globalize, but essentially all point to the necessity of Web-site globalization due to competitive pressures and the converging worldwide marketplace. For the many corporations IDC studied and features throughout this white paper, including Cisco, Macromedia, Charles Schwab, Kodak, Dell, IBM, Quokka, and AltaVista, all cited the need to globalize in order to optimize their increasingly international market opportunities as the universal driving factor behind Web-site globalization initiatives.

The benefits of Web-site globalization are many, but they also primarily follow the theme of growth and international expansion. As detailed in this paper’s quotes and sidebars, Web-site globalization directly increases international sales, improves global Web performance metrics, and expands customer support and reach. Improved customer interactions was another major theme cited by the respondents.

IDC's Web-Site Globalization Case Study Synopsis: Macromedia Goes Global — International ESD Sales Jump 50% in First Quarter

Macromedia (www.macromedia.com), a \$265 million leading vendor of software solutions for enhanced web sites has software including Macromedia Dreamweaver, Director, Flash, Shockwave, Aria, and LikeMinds, lives by the Web. Online publishing software account for 83% of the company's sales. "They [our customers] use our Web site as a way to find out information, download software, buy products, and share product extensions with each other. The Web is really at the core of our business model," states Mary Ann Walsh, vice president and executive producer of Macromedia.com. Shortly after its initial Web site launch in 1995, with almost 50% of its sales coming from outside North America, the company realized it had to globalize its Web site to maintain and build its international revenues. Starting in 1996 with Japan, Macromedia has since expanded globalization efforts to include 12 regional sites. Macromedia products are now also offered in up to eight languages.

Web-site globalization has brought many qualitative benefits to Macromedia, such as establishing a strong worldwide development community. It has also provided the company an excellent return on investment (ROI). The big ROI win was in increased ESD (Electronic Software Distribution) sales internationally. "[Initially] our big fear was that if we opened up ESD to the international market, it would cannibalize our traditional distributor model in those regions," admits Walsh. Keeping with its corporate Web-centricity, Macromedia decided to try it anyway and began offering ESD from its localized sites in mid-1999. "[Cannibalization] has not happened and our overall sales into the regions have increased," Walsh happily reports. In fact, in the first quarter that localized ESD sales were introduced (Q3/99), there was a 50% increase in international ESD sales. Localized Web-site marketing and registration for an international developer seminar also eliminated costly direct mailings and saved over \$126,000 in print and distribution costs for that one major event.

IDC's Four Stages of Web-Site Globalization: Central vs. Local Web-Site Control

IDC has identified four distinct stages of Web-site globalization (see sidebar, "IDC's Four Stages of Web-Site Globalization"). The majority of U.S. Web sites, as previously detailed, remain in the "tin" stage and are doing nothing to globalize. Companies that remain complacently U.S.-centric, those typically with little physical presence worldwide and no resources to hire a localization firm, will never build their international clientele to a significant level.

However, as the stakes continue to rise in global ecommerce, we expect this to shift dramatically in the next few years as the bulk of

corporations move up the Web hierarchy into “bronze,” “silver,” and “gold” status and willingly make the investments needed to do so. For example, IDC identifies the three caveats that companies need to attain the silver Web-site stage:

- An extensive physical international presence
- Technical expertise at the branch level
- A clear understanding at the local level of the overall goals of the Web site

Ultimately, the gold stage is often the most cost-effective Web-site globalization solution. Typically, these sites offer a good balance between centralized control and the flexibility of local content. In the gold stage hybrid model, country managers are still free to modify local Web content and focus on distinct localization challenges (e.g., regulatory compliance, high-quality translation, and local customer support). At the same time, the home office provides the guidelines in such areas as overall Web-site functions, strategies, navigation, and design. In addition to several optimized Web sites, (e.g., Cisco, Macromedia, Kodak) other effective localized gold sites include:

- **Dell Computer (www.dell.com)**. As detailed in *The Four Stages of Web-Site Globalization* (IDC #21037, December 1999), after successfully operating in the silver Web-site stage for a few years, Dell migrated to the gold stage last year in order to save money, while not greatly affecting local customization. By moving to a common platform and templates, what Dell refers to as a “copy-exact” model, the company estimates its international programming costs alone dropped 20%–30%.

IDC's Four Stages of Web-Site Globalization

- 1) **Tin:** *Company does nothing to localize. All international visitors must use the original home site and be proficient in that country's language.*
- 2) **Bronze:** *Web site contains basic information about the company's operations in foreign countries. Foreign language versions of the site exist, but they're only mirrors or copies.*
- 3) **Silver:** *Company allows each branch office to tailor its version of the site to the local marketplace. A great deal of independent local development occurs.*
- 4) **Gold:** *Company provides common global platform for all local sites. Branch offices may tailor local site to the local market within global guidelines.*

- **IBM (www.ibm.com).** IBM offers one-page “mini sites” featuring local content and information for more than 160 countries and full Web sites for almost 80 of those countries. More impressively, they all have a consistent look and feel, a core content set, and good regional content.

Lessons Learned

In hindsight, we can learn many lessons from enterprises that have already successfully implemented Web-site globalization strategies. For example, most corporate Web executives recommended a “hybrid” management approach to Web-site globalization that clearly defines and utilizes the contributions from both centralized and distributed groups. This approach seeks to create the right balance between the need for central management (e.g., control of technical platform infrastructures, templates for consistent look and feel, overall corporate and Web-site objectives) with the flexibility of localized content, input, and control. “The object [with hybrid management] is to encourage local creativity and support within a structure of global guidelines from centralized management,” says IDC’s Parr. Other advice offered included:

- **Fully leverage and carefully choose your local partnerships** for the best cultural fit and optimizing an effective globalized Web site. As one user stated: “Work with a provider that is built for the Internet so that you can be sure they understand the unique characteristics of translation for the Internet.” Most also agree that forming local partnerships is far cheaper and more effective than building a local physical presence within a target country.
- **Take a planned incremental approach to localization.** Carefully match your initial target countries to your product line, local service capabilities, customer base, and objectives.
- **Don't underestimate the importance or complexities of globalization.** Web-site globalization is just beginning, and the demand and solutions are just beginning to be realized. Get top-level management behind globalization and make sure a senior person or group champions and is responsible for the international initiatives.
- **Invest in properly maintaining and managing your localized Web sites.** Most users agree that this can be the toughest part of implementing a global Web strategy, as selective updating and global content translations must occur almost continuously.
- **Put the user experience first.** Always be aware of the experience that your international target user will have. Let the user have control over navigation — simplify and make links available, even English-only links, whenever possible.

IDC's Web-Site Globalization User Case Study Synopsis: STORES.org Accesses New International Readership and Revenue Streams

Rick Gallagher, publisher of the National Retail Federation's STORES.org, had long dreamed of offering multilingual support of his retail industry trade magazine. "We felt that as a trade organization, we were not providing enough in the languages of our members. We wanted to bring more value to our international member base," states Gallagher. But the localization cost and logistical barriers the NRF faced, at least in traditional hard copy, were far too great for the company to even consider globalization. Enabled by the proliferation of the global Internet, along with the Web-based translation and localization services available, Rick and his STORES.org team began a Web-site globalization project with eTranslate in late 1999. STORES.org successfully launched multilingual Web-site support, mirrored in Latin American Spanish and Brazilian Portuguese, in January 2000 as planned, on budget (\$38,000), and without a hitch. Access to new readership and revenue streams are cited as the most important benefits of the initial localization project. "Our biggest surprise to date is the success we're achieving as an ecommerce site," reports Gallagher. "Online subscriptions are really beginning to come in, especially on the international front," he adds. As a side benefit, Gallagher anticipates "cost savings as much as \$50,000 [in print and mail costs alone] this year." He notes that this would not only pay for the entire Web-site globalization project but also make STORES.org profitable for the first time since its inception five years ago.

Charles Schwab, with 6.6 million active accounts and \$725 billion in assets, is the fourth largest investment firm and number-one online broker in the world. While international revenues of the \$3.9 billion firm rose 68% in 1999 to \$250 million, it remains a fraction of the firm's business. Via a joint venture with a local partner, Schwab is now gearing up to launch its first localized Web site in Japan. "Our Web-site globalization will enable international expansion. As importantly, it accelerated our corporate learning curve on how best to understand, approach and successfully do business on the international stage."

— Ken Pavelle, Schwab's Web Operations Manager

Conclusion

Marking the recent launch of what IDC calls the Internet 2.0 era, regional shifts are already underway that are drastically altering Internet usage and spending patterns. By yearend 2003, IDC projects the United States will account for less than one-third of global Web users, down from about half in 1999. At the same time, ecommerce revenues in Western Europe and Japan will collectively approach almost half of the world's total by 2003, up from 28% in 1999.

IDC believes such shifts urgently drive the need for all Internet enterprises to carefully assess and implement strong strategic and tactical plans for Web-site globalization now. Further, IDC warns the present hesitancy toward Web-site globalization — the general complacency to settle for what IDC refers to as tin Web sites with no multilingual support or localization — will lead to increasing losses in the global Internet 2.0 era.

“The strategic return is the local portals allow us to get a lot closer to the customer and become more relevant to them by providing the local and global cut for searching information. The ROI is in the repeat customers, the additional advertising revenue, and the ability to leverage their platform from the dot-com site to the local sites.”

— James Anderson, Director of Business Development, AltaVista

As detailed in this white paper, the drivers and issues of Web-site globalization are many and complicated. Yet both the hard ROI and soft qualitative benefits of Web-site globalization are real today, as many corporate case studies affirm. Implementing a silver or gold Web-site globalization strategy, cost-effectively balancing centralized control with local flexibility, will provide enterprises further reach and opportunity into the World Wide Web. IDC urges firms to selectively align with Web-site globalization partners and localize now to optimize Internet success. As the Web quickly emerges from its English-only cocoon, now is the time to think and act globally. Web-site globalization is the next imperative for the Internet 2.0 era.

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