IDC MarketScape

# IDC MarketScape: Worldwide Quantum Computing 2026 Vendor Assessment

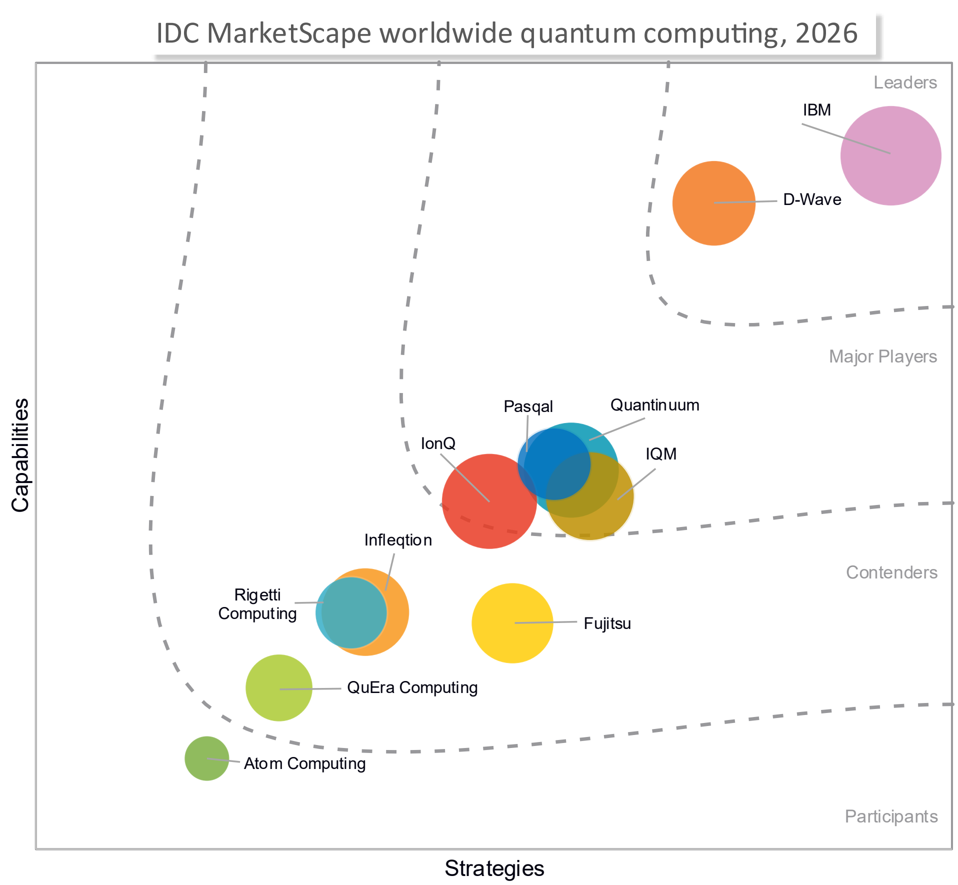
Heather West, PhD

## THIS EXCERPT FEATURES D-WAVE AS A LEADER

## IDC MARKETSCAPE FIGURE

### FIGURE 1

**IDC MarketScape worldwide quantum computing vendor assessment**




Source: IDC, 2026

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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Quantum Computing 2026 Vendor Assessment (Doc # US54125526).

## IDC OPINION

The quantum computing market in 2026 is entering a new phase defined less by theoretical capability and more by operational integration and measurable utility. While large-scale fault-tolerant quantum computing (FTQC) remains a long-term objective, vendors are increasingly moving beyond experimental access models toward platforms designed to support scientific, industrial, and enterprise workflows. The vendors assessed in this IDC MarketScape collectively reflect a broad range of commercial and operational maturity — from providers supporting recurring production-oriented research and hybrid computing workloads today to vendors whose commercially accessible platforms remain focused on logical qubit development, advanced experimentation, and early fault-tolerant infrastructure.

As a result, competition is increasingly shifting away from raw qubit counts and toward broader platform maturity. Leading vendors are differentiating through software ecosystems, hybrid quantum integration, structured customer engagement programs, deployment flexibility, and the ability to integrate quantum systems into existing high-performance computing (HPC), AI, and enterprise computing environments. At the same time, the market continues to diversify across multiple qubit modalities and architectural approaches, as vendors pursue different pathways toward scalable error-corrected quantum computing.

Importantly, the market is also beginning to produce early empirical evidence of both scientific and business value prior to the arrival of large-scale FTQC. Publicly disclosed examples now include quantum-assisted chemistry simulation, materials modeling, optimization, logistics scheduling, portfolio analysis, and scientific computing workloads where vendors and research collaborators report measurable improvements in runtime, accuracy, scalability, or workflow efficiency for targeted classes of problems. While these results remain narrow and workload specific rather than broadly transformative, they are helping shift market perception from purely theoretical future potential toward early operational utility and are contributing to growing enterprise, sovereign, and investor interest in the sector.

The industry's investment and competitive dynamics are evolving alongside this shift. During 2025 and 2026, the sector experienced increased IPO activity, sovereign investment initiatives, and strategic acquisitions as vendors sought the capital, manufacturing capabilities, software assets, networking technologies, and infrastructure components needed to compete in the emerging fault-tolerant era. Increasingly, vendors are positioning themselves not simply as hardware providers, but as broader quantum platform companies spanning hardware, software, orchestration, hybrid HPC integration, networking, and cloud delivery.

For technology buyers, the central challenge remains balancing near-term uncertainty against long-term strategic positioning. IDC believes organizations should evaluate vendors not only on current hardware performance but also on the maturity of their software environments, integration capabilities, deployment flexibility, roadmap credibility, and demonstrated ability to execute against public commitments. In 2026, these factors increasingly distinguish platforms evolving toward operational quantum computing infrastructure from those that remain primarily research-oriented systems.

This assessment reflects vendor information, customer references, product capabilities, roadmap disclosures, and market activities collected during IDC's evaluation period spanning March 3 through April 17, 2026. IDC's analysis incorporates vendor briefings, publicly available information, customer references where available, and supporting documentation provided during the evaluation process. Announcements or developments occurring after the close of the evaluation period were not included in scoring unless otherwise noted.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This IDC MarketScape is an evaluation of quantum computing vendors worldwide. Quantum computing remains an emerging market that comprises established IT companies, specialized hardware developers, and start-ups working to bring quantum systems to commercial use. These vendors are at varying stages of maturity: some have advanced to delivering commercially available systems that revenue-generating customers can access for production-oriented experimentation, while others remain in research and development (R&D) and have either not yet released a system that enterprises and organizations can access or have made their systems available only through open access programs intended to support algorithm development and broader quantum research. In addition, while all quantum hardware developers are basing their technology on the quantum properties of qubits, vendors differ significantly in how they exploit those properties, including the qubit modality used, the system architecture, and whether the underlying approach is gate based, measurement based, quantum annealing based, or programmable analog.

To ensure consistency between the vendors and technologies being assessed, this IDC MarketScape focuses on quantum hardware developers that have advanced to the commercial vendor stage and are able to provide a premium service to enterprises and organizations interested in identifying quantum use cases, developing quantum algorithms, and operating production-oriented quantum workloads. These premium services can include cloud or on-premises access to the vendor's quantum computing hardware, the supporting software stack and tools needed for quantum experimentation, and access to quantum professional services that can assist customers along their quantum journey. Eligible hardware architectures include gate based, measurement based, quantum annealers, and programmable analog quantum computers, provided the vendor owns the quantum processing unit (QPU) and overall system architecture.

IDC used the following inclusion criteria for quantum hardware vendors included in this IDC MarketScape:

- **Full-stack ownership:** The vendor must design, develop, and control its own QPU, supporting subsystems, and overall system architecture. Vendors supplying only quantum chips without systems integration, or those providing access solely to third-party hardware, are not eligible.
- **Commercial availability:** The vendor must have a commercially available quantum computing system during the evaluation period, accessible to external customers via a defined commercial access or pricing model, either through on-premises deployment or via the vendor's cloud offering or a cloud service provider's quantum platform. Internal R&D systems, roadmap-only prototypes, and educational or demonstration devices (typically fewer than 100 qubits) are not eligible.
- **Verifiable customer engagement:** Vendors must demonstrate real-world customer use beyond self-reported claims, including named enterprise, government, or research customers; published case studies or references; or revenue-generating contracts with documented use cases. Academic or research-only deployments are insufficient unless they also include real-world business or scientific use cases.
- **System-level roadmap:** Vendors must demonstrate control over hardware design, enabling subsystems, and performance optimization, along with a forward-looking hardware roadmap. Reliance on fabrication partners or cloud hosting is permitted, provided system-level control remains with the vendor.

IDC opted to exclude cloud service providers and quantum marketplaces that provide access to quantum computing systems developed by other quantum hardware vendors but do not develop and offer access to their own systems, since this evaluation focuses on quantum hardware vendors specifically. IDC also opted to exclude software-only quantum platforms, quantum simulators or emulators without hardware execution, and classical or quantum-inspired systems (including digital annealers and simulated bifurcation machines) that do not rely on physical quantum effects.

## ADVICE FOR TECHNOLOGY BUYERS

Organizations evaluating quantum computing platforms in 2026 face a market that has matured enough to reward strategic planning but remains early enough that organizations should avoid overcommitting to architectures or platforms that may not align with their long-term requirements. The vendors in this IDC MarketScape reflect a wide spectrum of technical maturity, commercial readiness, and roadmap credibility. The guidance that follows is intended to help technology buyers make investment decisions that remain flexible across the transition from today's hybrid small-scale quantum systems toward the fault-tolerant platforms expected to define the next decade:

- **Match the platform to your organization's quantum maturity.** Organizations still building foundational quantum awareness will find the most value in platforms with strong developer tooling, structured onboarding programs, and cloud-accessible entry points that allow experimentation without major capital commitment. Organizations that have identified priority use cases benefit most from vendors offering application-level tooling, co-development programs, and commercial engagement models aligned to relevant industry domains. Those building long-term strategic programs should evaluate vendors on the specificity and credibility of their fault-tolerance roadmaps and the continuity of their architectural strategy, prioritizing platforms that minimize the need for repeated replatforming across hardware generations.
- **Treat hybrid quantum-classical integration as a first-order requirement.** Near-term quantum value will be realized primarily through hybrid workflows combining quantum processors with GPU-accelerated HPC and AI infrastructure rather than through standalone quantum execution. Buyers should evaluate whether a platform's software stack, orchestration layer, and deployment model are designed for integration with existing compute environments, including HPC schedulers, AI infrastructure, enterprise security frameworks, and hyperscaler cloud platforms. Particular attention should be placed on demonstrated deployment and operational evidence rather than roadmap intent alone.
- **Assess roadmap credibility and commercial stability with equal rigor.** Fault-tolerant quantum computing has evolved from a distant research objective into a defined engineering target for a subset of vendors. When evaluating roadmaps, buyers should look for concrete intermediate milestones, identifiable technical mechanisms for achieving scalable error correction, and a demonstrated history of delivering against previously stated targets. Commercial durability is equally important. Organizations should assess whether a vendor has established repeatable customer engagement models, diversified revenue sources, and strategic partnerships that strengthen rather than constrain long-term platform viability. Public listings, acquisitions, and rapid expansion initiatives may provide access to capital

and technical capabilities, but they can also introduce execution risk if organizational integration or product strategy shifts disrupt roadmap continuity.

- **Validate platforms against your own workloads rather than relying solely on vendor-defined benchmarks.** The quantum computing industry still lacks universally accepted cross-platform performance standards, and many vendors continue to rely on internally developed metrics, benchmark methodologies, or highly optimized demonstration workloads. Buyers should evaluate whether vendors provide transparent methodology disclosures, reproducible results, access to benchmark code, and the ability to test representative workloads on available systems. The most meaningful evaluations are typically those tied directly to an organization's own computational priorities, operational constraints, and integration requirements.
- **Prioritize sovereign deployment capability for government, defense, and national research organizations.** Sovereign quantum infrastructure has become a strategic priority across Europe, North America, and Asia/Pacific. Buyers in these environments should evaluate whether a vendor can deliver and support on-premises hardware within required regulatory and geographic constraints, whether defined compliance frameworks for export control and data residency exist, and whether the vendor's manufacturing and support model can sustain multiyear operational deployments. Cloud-only vendors or those without demonstrated on-premises deployment experience may not satisfy the access, governance, and operational requirements of these environments.
- **Budget for internal capability development, not just platform access.** Organizations realizing the greatest value from quantum computing today are investing in parallel in the skills, workflows, and problem formulations needed to use quantum systems productively. Vendors offering workforce development, developer enablement, training programs, and structured co-development engagements provide a more complete adoption pathway than those offering hardware or cloud access alone. Organizations should treat internal quantum competency development as an integral component of platform strategy rather than as a separate downstream initiative.

## VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

## D-Wave

IDC has positioned D-Wave in the Leaders category in this 2026 IDC MarketScape for worldwide quantum computing.

### Background

D-Wave is a publicly traded quantum computing company founded in 1999 whose commercialization strategy, up until the 2026 acquisition of gate-based start-up Quantum Circuits Inc., has centered on making quantum computing operationally useful before the arrival of large-scale fault-tolerant systems. From its founding, the company operated from a single belief that enterprises could begin realizing business value from quantum computing sooner if quantum systems were designed to integrate into operational workflows rather than waiting for fully fault-tolerant universal quantum computers to mature. That belief led D-Wave to quantum annealing as its first commercial technology. Quantum annealing is a form of quantum computing that applies quantum effects to find optimal solutions to complex problems with large numbers of interacting variables. Consequently, these systems are particularly well suited to the combinatorial optimization challenges enterprises face in logistics, manufacturing, scheduling, and finance. This strategy has differentiated D-Wave from many quantum vendors whose commercial engagements remain concentrated in exploratory research programs. In 2011, D-Wave made the first commercial sale of a quantum computer and has since built a customer base spanning manufacturing, telecommunications, retail, logistics, defense, government, and research computing environments. Although gate-model quantum computing has long been part of D-Wave's broader vision, the January 2026 acquisition of Quantum Circuits Inc. significantly accelerated and clarified that strategy by combining gate-model technologies with capabilities originally developed through D-Wave's quantum annealing systems research. D-Wave's gate-based model product roadmap outlines plans to deliver a new system in 2026, along with a multiyear strategy designed to accelerate the development of commercial, fault-tolerant quantum computing.

### Systems and offerings

D-Wave's systems and offerings strategy is designed around operationalizing quantum computing within existing enterprise environments rather than positioning quantum as a standalone research platform. Unlike many quantum vendors whose customer engagements remain concentrated in exploratory pilots or algorithm research, D-Wave has focused heavily on production-oriented optimization deployments integrated into manufacturing, telecommunications, logistics, retail, defense, and research computing workflows. The company's broader platform strategy, spanning quantum annealing hardware, hybrid solvers, cloud delivery, developer tooling, onboarding programs, and training, is intended to reduce the infrastructure, application development, and skills barriers that have historically limited enterprise quantum adoption. This focus allows D-Wave customers to leverage quantum annealing now to gain commercial and business value.

D-Wave's quantum annealing roadmap has progressed from the company's original systems through the Advantage system and now the Advantage2 systems, D-Wave's sixth-generation platform that became generally available in 2025. Across these generations, D-Wave has focused on improving qubit connectivity, coherence, and optimization scalability. The transition from earlier Chimera architectures through the Pegasus typology to the current Zephyr topology has enabled denser graph connectivity and more flexible variable interactions, reducing the amount of problem decomposition required to map real-world optimization problems onto quantum annealing hardware. According to D-Wave, the Advantage2 system improves coherence and energy scaling, supporting larger optimization and materials simulation workloads while improving solution quality and runtime efficiency relative to previous generations.

A major differentiator for D-Wave is the extent to which quantum optimization has been integrated into operational environments rather than remaining confined to proof-of-concept experimentation. Public production implementations include hybrid quantum manufacturing scheduling with Ford Otosan, telecommunications network optimization with NTT DOCOMO, and workforce scheduling with Pattison Food Group. What differentiates these deployments is not simply that organizations are experimenting with quantum optimization, but that quantum workflows are being incorporated into manufacturing operations, telecommunications infrastructure management, and workforce planning. According to D-Wave, more than 200 million problems have been submitted to its systems to date, reflecting a level of production-oriented usage that remains relatively uncommon across the broader quantum computing market.

D-Wave positions hybrid quantum-classical workflows as the primary mechanism for operationalizing quantum computing within enterprise environments today. D-Wave's Leap cloud platform provides real-time access to quantum systems and hybrid solvers through a subscription-based model integrated with conventional enterprise development environments. According to D-Wave, the Leap platform operates across more than 40 countries with 99.9% availability, SOC 2 Type 2 certification, and subsecond QPU response times intended to support operational workloads rather than purely experimental access models. Ocean SDK, the company's open source Python toolkit, allows developers to build hybrid quantum applications using familiar programming workflows, while the Stride hybrid solver supports optimization problems involving up to 2 million variables and constraints. D-Wave positions these hybrid solvers as a key commercialization layer because they allow quantum optimization to be integrated into existing enterprise applications and operational decision systems without requiring fully quantum-native workflows or specialized quantum programming expertise.

To further accelerate adoption, D-Wave has invested heavily in onboarding and workforce development initiatives designed to help organizations move from evaluation into production deployment. The Leap Quantum Launchpad program provides guided onboarding, technical support, and free trial access; according to D-Wave, more than 1,300 businesses, governments, and universities have participated in the program to date. Structured training programs range from introductory quantum education through developer-focused application training intended to help organizations build internal competency incrementally rather than requiring dedicated quantum research teams from the outset.

Beyond operational optimization, D-Wave has increasingly positioned its quantum annealing systems for scientific simulation workloads, particularly in magnetic materials and quantum dynamics research. In 2025, D-Wave and researchers from 11 institutions published peer-reviewed research in Science, demonstrating simulation of magnetic materials dynamics on the Advantage2 prototype, reflecting the company's broader effort to extend quantum annealing into selected scientific computing domains relevant to materials science, electronics, and physical systems modeling.

D-Wave has also expanded beyond public cloud delivery into sovereign, on-premises, and forthcoming HPC-integrated deployment environments. Current deployments and planned installations include the Jülich Supercomputing Centre (JSC) integration with the JUPITER exascale supercomputer in Germany, Davidson Technologies in Alabama, SwissQuantum Technology in Europe, and Florida Atlantic University in Florida. The company's partnership with Carahsoft and the company's awardable status on the Tradewinds Solutions Marketplace for the Department of War further reflect D-Wave's growing emphasis on government, defense, and research computing procurement channels.

Looking ahead, D-Wave's roadmap includes both continued scaling of the company's quantum annealing systems and expansion into gate-model quantum computing. The planned Advantage3 system targets a multichip 100,000-qubit architecture. On the gate-model side, D-Wave has stated that technologies developed through its quantum annealing research, including superconducting control systems, cryogenics, and fabrication expertise, form part of the foundation for its emerging gate-model platform strategy following the Quantum Circuits Inc. acquisition. The company notes that the dual-rail qubit design enables native error detection at the physical hardware level and delivers high-performance operations with error detection and 99.9%+ gate fidelities. Key roadmap milestones for D-Wave's gate-model program include:

- **2026:** Delivery of a 17-physical-qubit system that supports logical error rates two times lower than physical error rates
- **2027:** Completion of a 49-physical-qubit system that can deliver an expected 20-fold error reduction factor over the physical error rate
- **2028:** Completion of a 181-physical-qubit system that can deliver an expected 2,000-fold error reduction factor over the physical error rate, representing the scalable blueprint for fault-tolerant architectures
- **2030:** Completion of a 10-logical qubit system that can support the first fault-tolerant algorithms
- **2032:** Completion of a 100-logical qubit system that can support initial quantum chemistry and quantum AI applications

## Strengths

- **Broad production deployment footprint.** D-Wave's customer activity extends beyond research experimentation into operational manufacturing, telecommunications, retail, logistics, defense, and research computing workflows. According to D-Wave, more than 200 million problems have been submitted to its systems, the Advantage2 system usage grew 314% year over year, and the Stride hybrid solver usage grew 114% over six months as of early 2026. Public implementations include manufacturing scheduling with Ford Otosan, network optimization with NTT DOCOMO, and workforce scheduling with Pattison Food Group.
- **Mature enterprise accessibility and hybrid adoption framework.** The Leap cloud platform, Ocean SDK, the Stride hybrid solver, the Leap Quantum Launchpad onboarding program, and a structured training catalog collectively reduce the infrastructure and expertise barriers that most often slow enterprise quantum adoption. Organizations can apply quantum-assisted optimization to problems involving up to 2 million variables without requiring dedicated quantum programming

expertise, while guided onboarding programs provide a pathway from initial evaluation to production deployment.

- **Extending quantum annealing beyond optimization into scientific simulation.** Published research on magnetic materials simulation and quantum dynamics reflects the company's active effort to extend quantum annealing into scientific computing domains relevant to materials science, electronics, medical imaging, and physical systems modeling.

## Challenges

- **Quantum annealing addresses a narrower workload range than universal gate-based computing.** The platform is well suited to combinatorial optimization, scheduling, scientific simulation, and certain AI-adjacent workloads, but organizations pursuing quantum chemistry, fault-tolerant algorithm development, or broader circuit-based initiatives may find the current architecture less aligned with those objectives. The hybrid solvers extend practical scope considerably, but the architectural boundary between quantum annealing and gate-model applications remains a real constraint that buyers should weigh alongside D-Wave's developing gate-model roadmap.
- **Gate-model roadmap remains at an early commercialization stage.** Although the Quantum Circuits Inc. acquisition accelerated and clarified D-Wave's gate-model ambitions, the company had not yet introduced a commercially available gate-model system or published commercial hardware performance benchmarks as of the April 2026 data collection period. Organizations evaluating D-Wave's broader universal quantum computing strategy should treat those capabilities as an emerging roadmap rather than an established commercial platform.

## Consider D-Wave when

- Consider D-Wave if your organization is pursuing production-oriented optimization workloads in areas such as manufacturing, logistics, workforce scheduling, telecommunications, routing, or supply chain operations where hybrid quantum-classical workflows can be integrated into existing operational environments rather than treated as isolated research projects.
- Consider D-Wave if you want a comparatively low-friction path for evaluating and operationalizing quantum computing through cloud access, hybrid application tooling, guided onboarding, workforce training, and integration with existing enterprise or HPC infrastructure.
- Consider D-Wave if you require deployment flexibility spanning cloud, sovereign, on-premises, research, or government computing environments while also monitoring the evolution of broader gate-model quantum computing capabilities.

# APPENDIX

## Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

## IDC MarketScape methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market definition

The worldwide quantum computing market includes systems, platforms, and technologies that apply the principles of quantum mechanics to computational problems that may be difficult, inefficient, or impractical for classical computing approaches alone. The broader quantum technology ecosystem also includes adjacent quantum-related technologies, such as quantum networking, quantum sensing, quantum timing, and quantum cryptography, as well as quantum-inspired systems that emulate selected quantum techniques on classical hardware.

For this IDC MarketScape, the evaluation focuses specifically on vendors developing commercially accessible quantum computing platforms built around proprietary quantum processing hardware and supporting software ecosystems. While several vendors assessed in this study also develop broader quantum technology portfolios spanning sensing, networking, cybersecurity, or related infrastructure technologies, those adjacent capabilities were evaluated only to the extent that they directly support or influence the vendor's quantum computing strategy, platform integration model, or roadmap toward larger-scale and fault-tolerant quantum computing systems. Particular emphasis was placed on current quantum computing capabilities, hybrid quantum-classical integration, commercially accessible deployment models, and each vendor's strategy for progressing toward scalable logical qubit and fault-tolerant architectures.

For detailed definitions of the quantum computing market, see *IDC's Worldwide Quantum Computing Taxonomy, 2026* (IDC #US53442126, May 2026).

# LEARN MORE

## Related research

- *IDC PeerScape: Practices for Navigating the Early Stages of Enterprise Adoption in Quantum Computing* (IDC #US54538826, June 2026)
- *IDC PeerScape: Practices for Quantum Computing Governance* (IDC #US54518926, May 2026)
- *IDC's Worldwide Quantum Computing Taxonomy, 2026* (IDC #US53442126, May 2026)
- *Lightning Round: What to Watch in Emerging Technology* (IDC #DIR2026_GS_LR, May 2026)
- *Going Mainstream: Enterprise Pathways to Quantum Adoption* (IDC #DIR2026_EMER_HW, May 2026)
- *Fujitsu Targets Scientific Advantage in Quantum Chemistry with STAR Architecture and Molecular Optimization* (IDC #lcUS54473326, April 2026)
- *Quantinuum, NVIDIA, AWS, and Hiverge Advance AI-Driven Quantum Algorithm Development* (IDC #lcUS54450826, March 2026)
- *IBM Quantum Advances Toward Quantum Advantage with New Molecular Discovery* (IDC #lcUS54443626, March 2026)

## Synopsis

This IDC study provides an assessment of worldwide quantum computing vendors with commercially available offerings through the IDC MarketScape model.

“2026 marks an inflection point for the quantum computing industry. Although fault-tolerant quantum computing has not yet been fully realized, a growing body of empirical business and scientific results is beginning to validate the long-term commercial direction of the market,” said Heather West, PhD, senior research manager and research lead, Global Quantum Computing Research, IDC. “As a result, vendors are increasingly competing not just as hardware developers, but as providers of broader quantum computing platforms integrating software, HPC, AI, cloud, and sovereign infrastructure capabilities.”

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## Global headquarters


One Beacon Street
Suite 33100
Boston, MA 02108
USA
508.872.8200
X: @IDC
blogs.idc.com
www.idc.com