

IDC MarketScape: Worldwide Configure Price Quote Applications for Commerce 2024–2025 Vendor Assessment

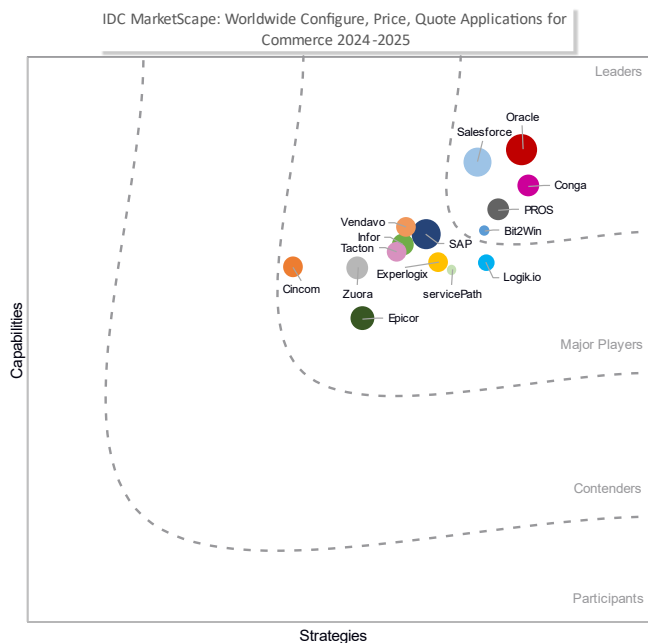
Heather Hershey

THIS EXCERPT FEATURES PROS AS A LEADER

IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape Worldwide Configure Price Quote Applications for Commerce Vendor Assessment



Source: IDC, 2024

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

ABOUT THIS EXCERPT

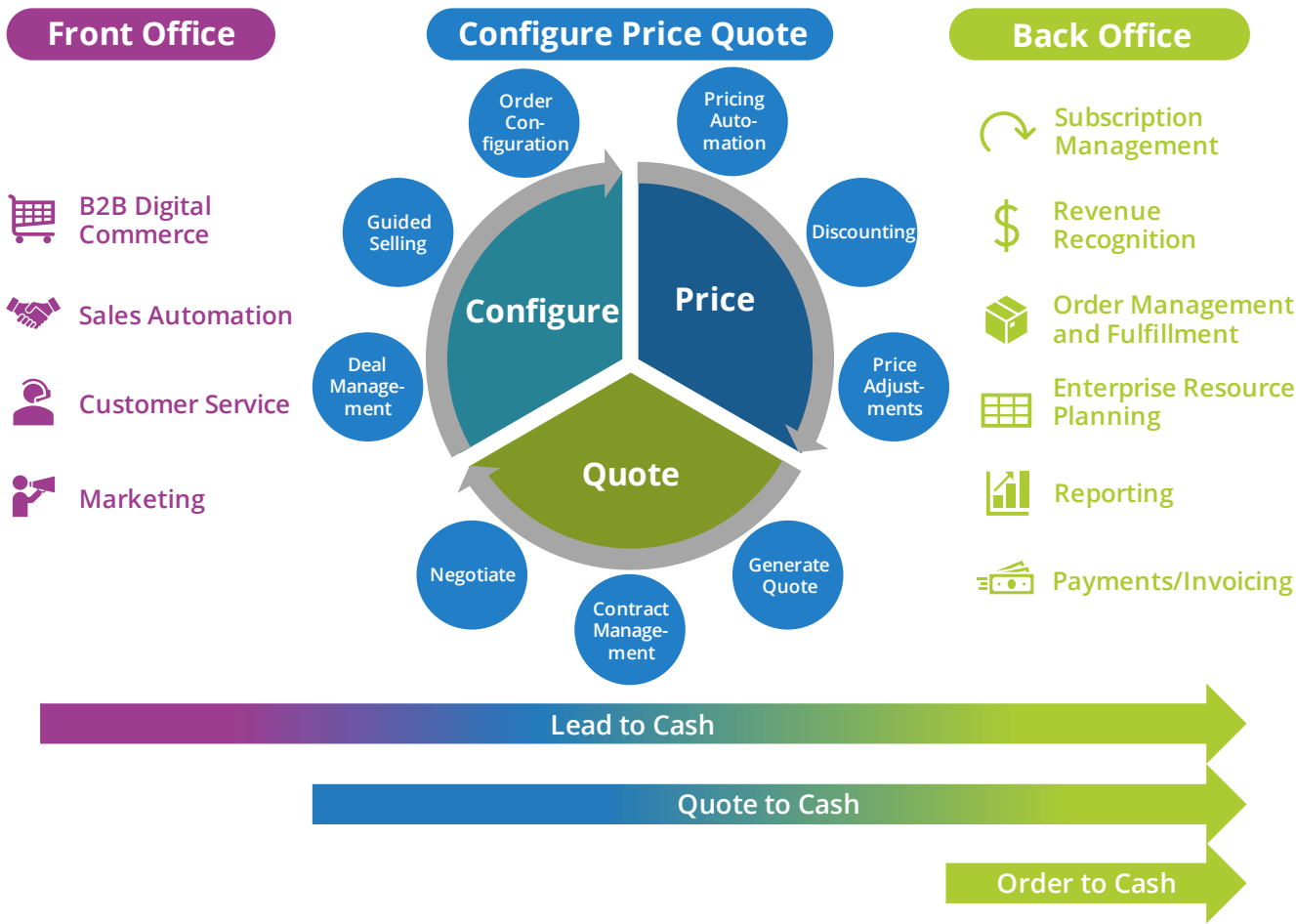
The content for this excerpt was taken directly from IDC MarketScape: Worldwide Configure Price Quote Applications for Commerce 2024–2025 Vendor Assessment (Doc # US50608124).

IDC’S OPINION

Configure, price, quote (CPQ) software streamlines the process of configuring complex products and services, optimizing pricing, and generating accurate quotes (see Figure 2). This is a category of software that helps businesses manage intricate configurations, automate pricing strategies, and speed up the sales cycle, enhancing accuracy and efficiency.

FIGURE 2

CPQ for Optimizing Complex Configurations and Quoting



Source: IDC, 2020

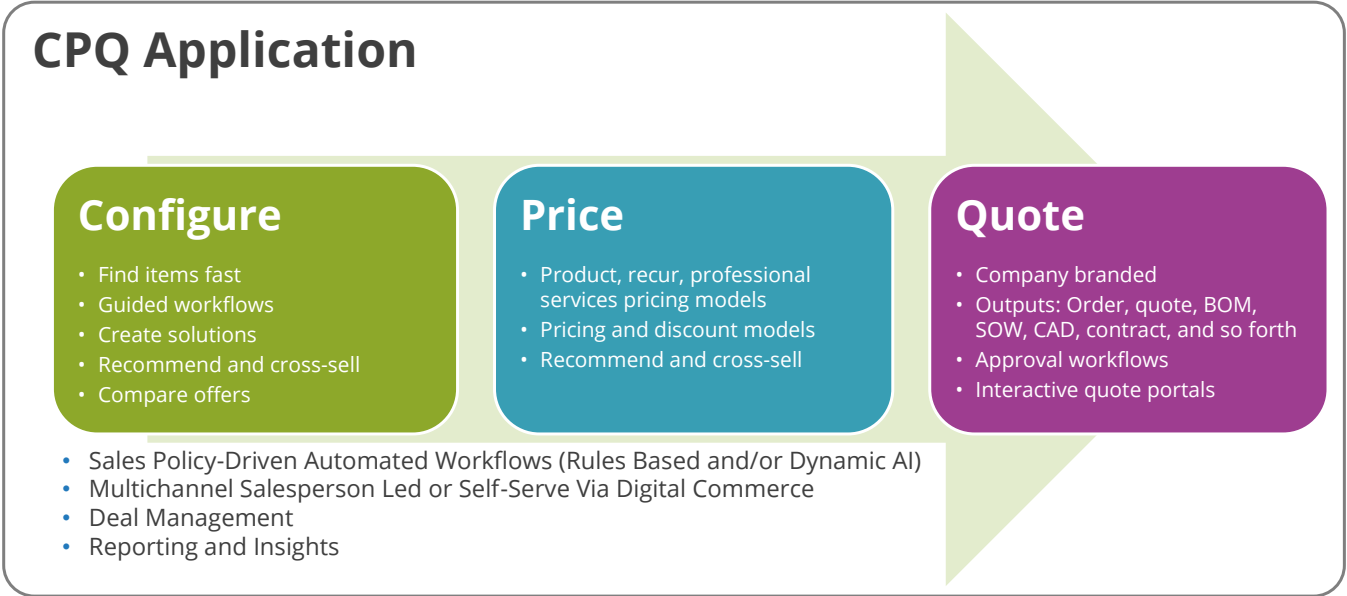
CPQ solutions have undergone significant evolution, transitioning from niche tools primarily used in manufacturing to essential components of modern sales processes across various industries. This transformation has been driven by advancements in technology, changing customer expectations, and the need for greater efficiency in sales operations.

The inclusion criteria for IDC's CPQ assessment require the product to meet functionality standards for configure, price, quote applications, be delivered as multitenant or single-tenant SaaS (excluding on-premises solutions), and target upper midmarket or enterprise buyers with annual revenue over \$100 million. Vendors must have at least 20 active customers in this segment, specifically B2B organizations, with live deployments across multiple industries. In addition, the product must be explicitly marketed as a CPQ solution and be sold commercially, excluding free or community-based models.

See Figure 3 for a high-level view of typical CPQ functions.

FIGURE 3

Typical Functions of a CPQ



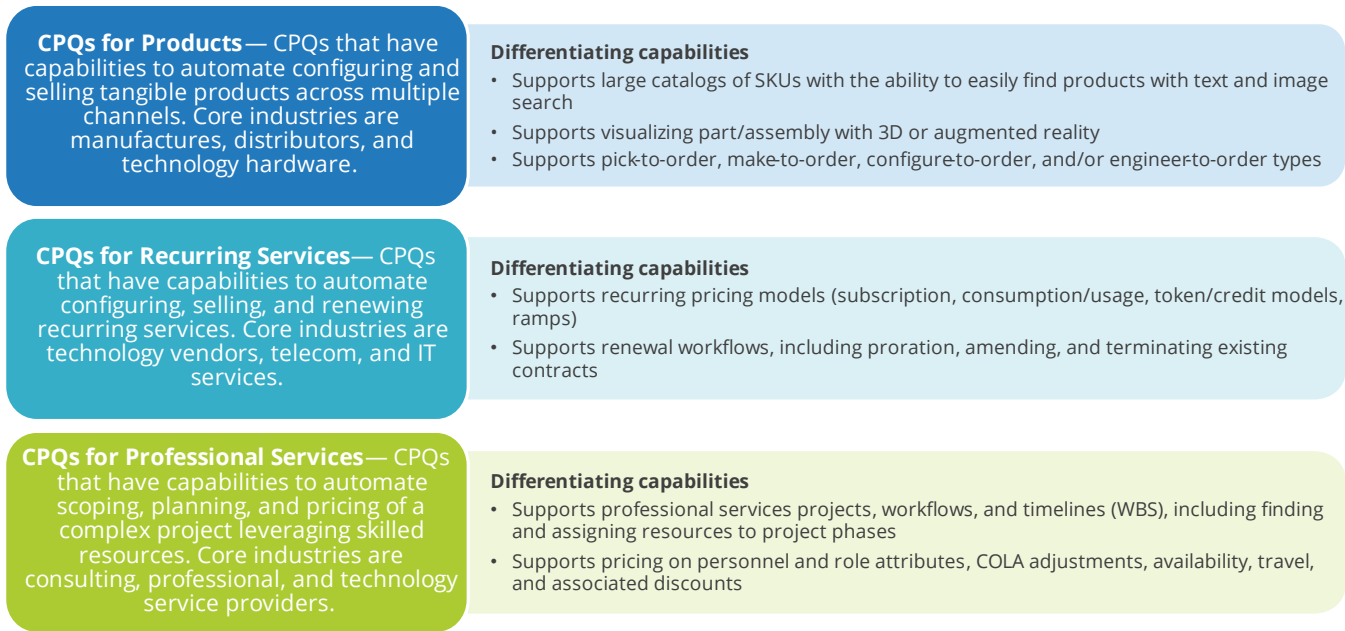
Source: IDC, 2024

Please see the Market Analysis section, under the Appendix section, of this document for a detailed summary of the historical evolution of the CPQ market.

See Figure 4 for an explanation of the differentiating capabilities found among CPQs that specialize in the configuration and sales of products, recurring services, and professional services. Note that some vendors can support all three domains. This information will be detailed in the vendor profiles throughout this document.

FIGURE 4

Three Primary CPQ Segments



Note: Most CPQ applications support multiple segments.

Source: IDC, 2024

For a more detailed view of CPQ’s capabilities and feature sets on a granular level, readers should explore the three IDC ProductScape assessments that preceded this publication:

- *IDC ProductScape: Worldwide Configure, Price, Quote Applications for Selling Professional Services, 2024* (IDC #US52350224, June 2024)
- *IDC ProductScape: Worldwide Configure, Price, Quote Applications for Selling Recurring Services, 2024* (IDC #US51490424, June 2024)

- *IDC ProductScape: Worldwide Configure, Price, Quote Applications for Selling Products, 2024* (IDC #US52350124, June 2024)

Summary of Recent Key Trends in the CPQ Market

Advanced AI in CPQ

The integration of artificial intelligence (AI) and machine learning (ML) into CPQ systems has been a game changer. These technologies enhance pricing calculations, optimize quotes, and improve the overall accuracy of configurations. As a result, sales teams can generate quotes faster and with fewer errors, significantly improving productivity and customer satisfaction.

Shift to Multicloud Solutions

The evolution from on-premises CPQ systems to multicloud architectures has enhanced accessibility and flexibility. Multicloud solutions enable businesses to deploy CPQ across multiple environments, reducing dependency on a single vendor, improving resilience, and allowing for greater customization. This approach also simplifies integration with various cloud-based applications and platforms, ensuring businesses can scale and adapt quickly to evolving market conditions. Multicloud architectures are especially beneficial for global enterprises, enabling compliance with regional data regulations and ensuring optimized performance across geographies.

Enhanced Customer Experience

Modern CPQ solutions focus heavily on improving the customer experience (CX). They empower customers with self-service capabilities that resemble B2C shopping experiences, allowing them to configure products and receive quotes without direct sales assistance. This empowerment streamlines the purchasing process and reduces costs for businesses by minimizing sales rep involvement in every transaction.

Move Toward Modular and Microservices Architectures

CPQ systems are increasingly adopting modular and microservices architectures to enhance flexibility and scalability. This shift is driven by the need for improved CX enabling faster, personalized configurations and more agile responses to market demands. By leveraging modular architecture (and microservices architectures on the more extreme end of modularity), organizations can integrate new functionalities or third-party applications that enable continuous innovation without disrupting existing processes. In addition, this architecture supports rapid deployment and iteration, empowering businesses to quickly adapt to changing customer preferences and competitive landscapes.

Emergence of Pre-Integrated Revenue Life-Cycle Management Platforms

CPQ systems are increasingly expanding into revenue life-cycle management (RLM) platforms, aiming to integrate quoting, billing, contract renewals, digital commerce, sales, and subscription management into a single “super system.” For customers, this approach could offer a more unified experience, but the return on investment (ROI) is dependent upon the RLM system's ability to orchestrate and manage the functions of multiple previously siloed domains across the back and front office without introducing new opportunities for platform lock-in and integrations complexity.

Projections About the Future of CPQ for Commerce

CPQ solutions are expected to continue evolving in several ways:

- CPQ solutions will increasingly adopt modular architectures, allowing businesses to customize the software based on specific industry needs, scaling up or down as necessary. This flexibility will enable rapid adaptation to evolving market conditions and customer demands.
- CPQ will become more embedded in omni-channel commerce strategies, providing consistent, personalized quoting experiences across digital, in-person, and mobile sales channels. This will empower businesses to offer seamless customer experiences across platforms. As more of the sales process moves into ecommerce and self-service portals, CPQ (or whatever it evolves into) may become the main transactional orchestration engine for B2B digital commerce.
- CPQ will become more autonomous. The next wave of CPQ evolution will focus on greater automation in the quote-to-cash process. End-to-end workflow automation, from the initial product configuration to contract management and billing, will reduce manual intervention and shorten sales cycles. CPQ systems will leverage AI to provide deeper insights into customer behavior, enabling more personalized, real-time offers and pricing strategies. Predictive analytics will become central to refining configurations and automating decision-making in complex sales environments. The use of advanced AI — as opposed to previous generations of symbolic AI and workflow engines dependent on human-configured logic — will become more ubiquitous in CPQ, leading to a simplification of user interface design and the obsolescence of vendors with no advanced AI in their software.

The evolution of CPQ over the past decade reflects a broader trend toward automation and customer centricity in sales processes. As technology continues to advance, CPQ solutions will play an increasingly critical role in helping organizations streamline their operations while enhancing the overall buying experience for customers.

This IDC MarketScape assessment takes the historical evolution of CPQ and all the aforementioned potentialities into account to highlight the vendors that are best poised to capture the anticipated autonomous, experiential zeitgeist in B2B digital commerce.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

- Product must meet IDC's functionality requirements for a configure, price, quote application (see the Market Definition section).
- Product assessed must be delivered as a multitenant or single-tenant SaaS (no on-premises products).
- Product must be designed for upper midmarket or enterprise buyers (\$100+ million in annual revenue)
- Vendor must have a minimum of 20 active customers from the upper midmarket or enterprise buyers (\$500+ million in annual revenue) with live deployments of the CPQ product.
- Product must be sold to and used by B2B organizations.
- Product must be able to support more than one industry and be actively deployed in more than one industry.
- Product's website must specifically mention that the product is a CPQ.
- Product must be sold (no free or "community model" products).

ADVICE FOR TECHNOLOGY BUYERS

Consider these points during your search for a CPQ solution:

- Ensure vendors demonstrate how to manage rule complexity post-implementation. Admins should easily create and manage rules using no-code/low-code tools provided before purchase.
- Know that approval workflows can be complex in certain use cases, so make sure the CPQ application supports customizable approval workflows.
- Understand that vendors typically offer two pricing models: per user for those using a UI (salespeople, partners, etc.) and consumption based for digital transactions. Understand the current and future transaction volumes for accurate budgeting if using CPQ for digital transactions.
- Ask vendors about their 2025 ML and generative AI (GenAI) plans to support price optimization, automation, quote text generation, and guided selling/chat. Also, inquire about AI pricing, privacy, and ethical considerations.

- Don't fall victim to Conway's Law, which suggests that system design reflects organizational structure. The influence of ubiquitous advanced AI in enterprise applications may allow global businesses to flatten their hierarchies, allowing new application categories made for leaner cross-functional teams to come to the fore. Newer-generation cloud-based CPQ is well positioned to take the lead in this new era of convergent commerce technology. Be mindful of this dynamic as you research your options.
- Prioritize vendors that offer interactive quote portals to streamline the quoting and approval process if quotes involve collaboration between employees, partners, or customers.
- Ensure the CPQ system can scale with your business as it grows. Look for modular solutions that you can expand to accommodate more complex product lines, services, or increased transaction volumes without needing a complete overhaul.
- Consider a CPQ built with a microservices architecture and not just modular architecture if "future proofing," expansion from B2B into B2C/DTC, and delivery of cutting-edge customer experiences across all customer-facing channels are your ultimate goals, as you can technically do modular architecture via partitioning a monolith. Just be aware that this may require more skilled IT resources as a trade-off for the enhanced strategic architectural agility.
- Consider the vendor's track record for support and updates. Ensure they have a clear, innovative road map for future developments in AI, automation, and evolving sales processes, to keep the system aligned with emerging market trends.

These recommendations will help ensure that your CPQ system not only meets current needs but also positions your business for the future of digital commerce.

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.

PROS

After a thorough evaluation of PROS' strategies and capabilities, IDC has positioned this vendor in the Leaders category within this IDC MarketScape for configure price quote applications for commerce 2024–2025 vendor assessment.

PROS Holdings Inc., owner of PROS Smart CPQ, is a publicly held company headquartered in Houston, Texas, founded in 1985. PROS is well known for its price optimization platforms for travel and B2B industries. PROS CPQ was introduced in 2014 after acquiring Cameleon Software in 2013 to extend its B2B pricing capabilities. The current version of PROS Smart CPQ is a cloud-based solution designed to streamline product configuration, pricing management, and quote generation.

Serving industries such as manufacturing, distribution, and services, PROS CPQ integrates with CRM and ERP systems to offer a unified sales and pricing management solution. Key features include guided selling, product and service configuration, automated approvals, and dynamic pricing. The platform enhances sales efficiency, reduces cycle times, and improves customer satisfaction through accurate quotes. PROS Holdings Inc. operates globally, generating revenue in the United States, Europe, Africa, Asia/Pacific, and the Middle East, and its solutions enable personalized experiences across various sales channels, including direct sales, partner networks, online, mobile, and emerging platforms.

Quick facts about PROS:

- **Employees:** ~1,400
- **Industry focus:** Healthcare and life sciences, distribution, manufacturing, retail, financial services, IT and cloud services, software, telecommunications, transportation, airline, utilities, and automotive
- **CPQ is optimized for selling:** Products, recurring services
- **Pricing model:** PROS Smart CPQ has multiple pricing options. Most commonly PROS customers license based on a PUPM basis to be congruent with buyer CRM licenses
- **Ideal customer size:** Midmarket and enterprise
- **AI in CPQ product:** PROS has invested heavily in proprietary ML throughout its CPQ product, particularly for the pricing; GenAI capabilities are on the road map
- **Cloud:** Application is multitenant at the application, database, and infrastructure layers and can be deployed on Azure
- **Architecture:** ~90% of the CPQ product is based on microservices architecture
- **Implementation ecosystem:** Has 12 implementation partners for CPQ
- **Percentage of customers that self-implement:** 2%–30%
- **Prebuilt integration highlights:** SAP S4/HANA, SAP R3, SAP ECC, Salesforce CRM, Microsoft Dynamics 365 CRM, SAP Cloud for Customer

Strengths

- **Built for the future, driving AI for CPQ today:** PROS is committed to continuing to add more advanced AI features to its CPQ. Customers interviewed for this assessment indicated that the newest version of PROS Smart CPQ appears to be well suited for agile, future-proofed business. One customer even went on to say, "They're a very innovative company."
- **Deep integration for Microsoft Dynamics 365 CRM:** As a Microsoft Inner Circle Partner and recent Partner of the Year, PROS codeveloped its integration with Microsoft. It is also co-innovating with MS to ensure PROS Smart CPQ fully harnesses the capabilities of Microsoft's Sales Copilot.
- **Advanced pricing:** PROS offers advanced pricing functionality, including the support of many pricing models out of the box, the ability to set pricing that moves with market indices, enabling buy-side price optimization, and support of dynamic pricing based on inventory/supply chain availability.

Challenges

- **Cost:** The cost of PROS CPQ can be a concern, especially for smaller businesses. The pricing structure of PROS CPQ is designed for upper midmarket and enterprise customers needing cutting-edge logic for sales operations. This solution may not be suitable for smaller companies, for which PROS' sophisticated pricing and quoting automations might be overkill in terms of function and cost.
- **Product configuration:** PROS CPQ is more advanced in its pricing and quoting functionalities than in product configuration. The system excels at pricing strategy, especially with its use of data analytics and AI to optimize pricing decisions based on market trends and customer data. However, its capabilities in product configuration, while competent, are not as feature rich. Customers also wanted better parallel processing with supply/inventory systems during product configuration processes.
- **Admin user interface:** While customers appreciated the simplicity of the sales user UI, they wanted the Admin UI to be easier to use.

Consider PROS When

You are an enterprise with large numbers of complex products, services, or workflows needing a flexible CPQ application with advanced AI (GenAI, ML, predictive AI) built for complex and dynamic pricing for selling over multiple channels.

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 represent 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

Configure price quote (CPQ) applications are software solutions that enable companies to efficiently configure products and services, execute pricing strategies, manage deal construction, and generate quotes for customers. These systems are particularly crucial in complex B2B sales environments where the accurate tailoring of offerings and pricing to customer needs can significantly impact sales success and operational efficiency. By automating these aspects, CPQ solutions help streamline sales processes,

reduce errors, maximize margins, and ensure consistency across transactions. Since CPQ applications are at the nexus of selling strategy, product catalog, pricing, deal desk/approvals, and commerce, they must be capable of integration with many adjacent applications to provide cohesive and intelligent sales processes.

- **Core functionality:**
 - Configuration of products/services to meet customer specifications
 - Dynamic pricing adjustments based on various factors, including volume, customizations, and market conditions
 - Automated quote generation that reduces manual errors and speeds up the sales cycle
- **Integration capabilities:**
 - Integration with CRM, ERP, PIM, subscription management, and other revenue life-cycle management systems to utilize existing customer data and financial information
 - Support for incorporating data from external sources to inform pricing and configuration decisions
- **Strategic value:**
 - Enhanced efficiency, governance, and accuracy in sales operations, leading to improved customer satisfaction and faster deal closures
 - Insightful analytics on quote performance and profitability, aiding in strategic decision-making
- **Technological advancements:**
 - Utilization of GenAI and ML for predictive analytics, improving quote accuracy, generating quotes/offer letters, and suggesting optimal configurations and pricing strategies
 - Support for both sales-led and digital commerce channels, enabling self-service and personalized buying experiences

Market Analysis

For Context: A Brief History of CPQ

- **1980s:** Product configurator tools first emerged for manufacturers:
 - The origins of CPQ systems go back to the 1980s when product configurators were developed primarily for manufacturing sectors and were often part of ERP systems. These early configurators were designed to help manage complex product specifications and integrate with other enterprise management systems to streamline production and business processes.

- These configurators initially served as back-office tools to support complex manufacturing and ordering processes. As CRM platforms began to emerge in the late 1980s, these product configurators started to interface with CRM systems. This integration was aimed at enhancing front-office functions, such as sales and customer service, by providing more detailed and accurate information during customer interactions.
- **1990s:** Early on-premises CPQ systems became more standardized but remained niche, largely limited to industries with complex product offerings, such as manufacturing and telecommunications:
 - The 1990s saw CPQ begin its evolution from back-office utility to a key enabler of sales, pricing, and customer service. With the rapid expansion of CRM capabilities, CPQ systems were increasingly refined to improve sales processes and customer interactions directly through CRM interfaces. This period emphasized the growing importance of CPQ systems in managing customer relationships and enhancing the sales cycle with more accurate and efficient tools.
 - The mid-to-late 1990s further accelerated the transformation of CPQ systems with the rise of ecommerce. The digital marketplace demanded more from CPQ systems, which adapted to allow customers to self-configure products online. This adaptation was critical as it extended CPQ functionalities to end consumers, facilitating a more interactive and engaging purchasing experience.
- **2000s:** CPQ adoption expanded, as businesses across various industries began recognizing the need to streamline pricing and configuration processes; the Great Recession began to nudge CPQ into the cloud:
 - Throughout the mid-2000s, CPQ solutions began to incorporate more advanced features, such as pricing optimization algorithms and more dynamic, user-friendly configurators. These enhancements were driven by the need to support increasingly complex sales cycles and product configurations that were becoming common in industries such as manufacturing, telecommunications, and high tech.
 - The financial crash of 2008 would have major long-term impacts on the CPQ market and cloud computing in general. The lingering global aftershocks of the financial crisis of the late 2000s resulted in market consolidation, with several key CPQ players being acquired by larger, better-capitalized technology firms in the 2010s.
- **2010s:** CPQ moved into the cloud, became increasingly more self-service on the front end, and evolved to be more seamlessly integrated with CRM on the back end:

- Persistent macroeconomic headwinds at the beginning of the decade compelled corporations to transition into cloud computing, providing an edge to CPQ vendors hosted in the cloud. The shift to the cloud allowed CPQ systems to integrate more deeply with other enterprise applications, helping businesses manage pricing and quoting more efficiently. This decade also saw CPQ expand beyond its traditional manufacturing base into new industries.
- AI and ML began playing a key role in CPQ software by enhancing pricing optimization (including the enablement of dynamic pricing) and more relevant product recommendations.
- CPQ tools increasingly integrated with CRM and ecommerce platforms, providing sales teams with real-time customer and product data for personalized quoting. The ability to handle complex product configurations and large catalogs became a standard feature.
- More robust self-service features emerged due to better integration with cloud-based digital commerce platforms and sales interfaces, allowing customers to configure products and receive quotes independently.
- **2020s:** CPQ continues to evolve, with advancements in AI, mobile interfaces for on-the-go quoting, and enhanced collaboration features that enable cross-departmental input during the quoting process:
 - CPQ systems are increasingly adopting AI for predictive analytics, enabling smarter recommendations for pricing, discounts, and product configurations. Advanced AI also supports more dynamic pricing strategies that adjust in real time based on customer data and market trends. Generative AI is leveraged in contract generation and beyond.
 - Mobile-friendly interfaces empower sales teams to generate quotes on the go, with real-time access to product, pricing, and inventory data. This mobility accelerates sales cycles and improves customer responsiveness.
 - Collaboration features allow cross-functional teams, including finance, legal, and sales, to contribute to the quoting process, improving accuracy and reducing delays. CPQ's role expands beyond just sales, touching on revenue management and customer retention strategies.
 - Cloud-based CPQ systems increasingly integrate into broader enterprise ecosystems while gradually becoming more modular and multicloud. Some of these solutions are gradually, deliberately evolving into comprehensive RLM platforms that handle everything from initial configuration to recurring billing and contract renewals, positioning CPQ as a core component of enterprise revenue operations.

Related Research

- *Worldwide Digital Commerce Platform Forecast, 2024–2028: Bots for Everyone at the End of eCommerce Democratization* (IDC #US52611824, October 2024)
- *Worldwide Order Management and Orchestration Applications Forecast, 2024–2028: Slow Growth for Specialists in the Era of Platform Consolidation* (IDC #US52611924, October 2024)
- *Worldwide Order Management and Orchestration Applications Market Shares, 2023: The Dawn of AI-Optimized Customer-Centric Order Experiences with a Sustainable Edge* (IDC #US52530324, September 2024)
- *Worldwide Digital Commerce Applications Market Shares, 2023: The Year Omni-Channel Commerce Came Roaring Back* (IDC #US52537724, September 2024)
- *IDC ProductScope: Worldwide Configure, Price, Quote Applications for Selling Professional Services, 2024* (IDC #US52350224, June 2024)
- *IDC ProductScope: Worldwide Configure, Price, Quote Applications for Selling Recurring Services, 2024* (IDC #US51490424, June 2024)
- *IDC ProductScope: Worldwide Configure, Price, Quote Applications for Selling Products, 2024* (IDC #US52350124, June 2024)
- *IDC MarketScope: Worldwide Enterprise Headless Digital Commerce Platforms 2024 Vendor Assessment* (IDC #US50626423, June 2024)
- *IDC MarketScope: Worldwide Enterprise B2C Digital Commerce Applications 2024 Vendor Assessment* (IDC #US49742623, March 2024)
- *IDC MarketScope: Worldwide Enterprise B2B Digital Commerce Applications 2023–2024 Vendor Assessment* (IDC #US49742523, December 2023)

Synopsis

This IDC study provides a clear analysis of the key trends shaping the global CPQ market. It traces the evolution of CPQ from its early roots in manufacturing to its current role as a cloud-based solution integrated with advanced AI and automation capabilities. This document emphasizes the increasing importance of modular- and microservices-based architectures for scalability and adaptability, supporting complex configurations, dynamic pricing, and enhanced self-service capabilities. In addition, it outlines how CPQ systems are expanding into broader RLM platforms, offering unified solutions for quoting, billing, and contract management. This document offers practical guidance for CIOs evaluating CPQ products in 2025, focusing on the technologies driving efficiency and flexibility in B2B commerce.

"The roots of modern CPQ predate the category we now call CRM. The story of CPQ is one of constant evolution and very practical business value," says Heather Hershey, research director, Worldwide Digital Commerce Strategy at IDC. "In the broader context of B2B digital commerce, CPQ is emerging as a critical orchestrator, streamlining the entire revenue life cycle, including configuration, pricing, and deal management. As the category continues to mature, CPQ will play an increasingly central role in helping businesses automate complex processes and produce delightful B2B customer experiences."

ABOUT 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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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