

**Study area:**

Public Sector in Asia

**Country coverage:**Australia, China,  
Hong Kong, India,  
Indonesia, Japan,  
Korea, Malaysia, New  
Zealand, Philippines,  
Singapore, Taiwan,  
Thailand**Industry coverage:**Public Sector,  
including Healthcare  
and Education**Background: Multinational information technology corporation established in market leadership**

As one of the world's largest information technology corporations, the international presence our client has established includes an all-encompassing technology product portfolio in computing, software and services. It has achieved continued growth in the Asian market and has been maintaining several leadership positions in various technology sectors.

**Business need: Addressing opportunities proactively in Asia's public sector**

The public sector represents an especially prominent component of the IT market in Asia Pacific; however, detailed information on the size, scale and dimensions of the market is limited. Our client wanted to better understand the market in order to increase revenues and address the opportunity more proactively. Although our client had existing research focused on general public sector market sizing, they wanted to do a "bottoms-up" approach that would size the market in a much more granular nature by country and ministry.

**Solution: Rigorous primary research and interaction with key officials**

In the initial stage, extensive desk research was utilized whereby a variety of sources were scanned and analyzed to find all public information available to build a foundation of market insight and understanding. A database of tenders was also developed for each country and this database tracked and measured all public tenders by ministry, size, and components to identify the winning tenders. To supplement this desk research, Springboard conducted 5 – 10 expert interviews in each country with public sector experts to gather additional market inputs. Interviews were primarily held with government officials, but market consultants and IT providers were also interviewed to gain a more complete view of the market and future spending plans.

"We needed to gain more depth on how our public sector accounts are investing in IT and Springboard was able to provide us with the depth, breadth and accuracy of the research materials that we needed most. In my opinion, Springboard provides impeccable customer service and is able to respond flexibly and rapidly to meet our tight deadlines."

**Regional Marketing  
Manager, Public  
Sector**

One of the challenges faced in collecting public sector tenders and spending figures was the transparency of the market in the respective countries. The approach Springboard employed required resourcefulness, patience interacting with bureaucratic government officials and diligence in working through volumes of government records.

The consolidation of all acquired information was done in the final research process which was aimed at providing a consistent picture cross all countries. A data modeling exercise was executed to derive data estimates, which were then processed under a rigorous data quality control standard. Lastly, a collaboration of Springboard Research teams at the regional and local levels was leveraged to gather additional market inputs.

### **Business value: Precise view of the public sector provided to field teams**

The research project illuminated the public sector opportunity in great detail and in consistency across countries. This view provided sizing by key IT market segment, and also by public sector categories such as defense, taxation, border control and other key segments. In addition, the top 15 public sector accounts in each country were identified, which enabled the client to gauge its market share in each account. The information provided allowed the client to develop more effective public sector strategies for the coming fiscal year, and also elevated the effectiveness of the public sector sales teams across the region.