

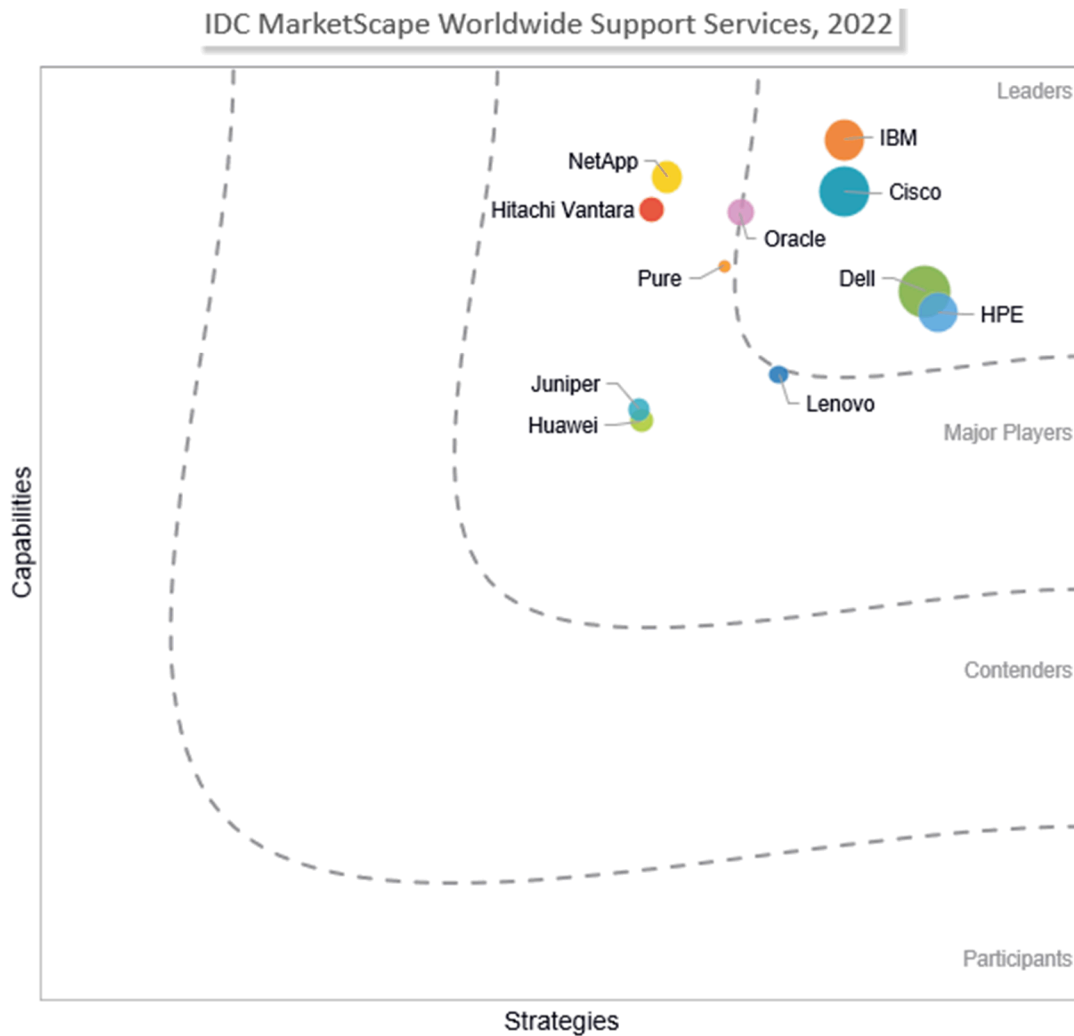
IDC MarketScape: Worldwide Support Services 2022 Vendor Assessment

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IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Support Services Vendor Assessment



Source: IDC, 2022

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

IDC OPINION

This study assesses 11 support providers that are participating in the worldwide support services IDC MarketScape model. Vendor selection included the major OEMs with extensive support portfolios. This assessment discusses both quantitative and qualitative characteristics that explain success in this important but mature market. The support industry is at an inflection point, particularly in the developed, enterprise sector. In those markets, penetration is very high, and it is becoming increasingly difficult for vendors to differentiate core services and supporting technologies. However, vendors have the opportunity to increase differentiation and create new annuity streams by developing services portfolios that impel enterprise customers to higher levels of support and management maturity, resulting in greater benefits for those customers. In addition, vendors that can continue to expand both core and advanced services into the midmarket and into emerging markets will continue to see success. Additional factors for success identified from this study – some of the initiatives we are beginning to see implemented by the more active vendors in the support market that is helping them propel themselves past some of their competition – include:

- Increasing adoption of consumption-based portfolios, which drive 100% attach rates for some services
- Assisting companies with new IoT and analytics solutions, which will need support solutions that may incorporate new technologies such as AR and VR
- Developing proactive methodologies such as machine-to-machine support solutions to help drive operational efficiencies and reduce costs and downtime to the customer
- Investing in the customer experience (CX), taking into consideration product and all aspects of service (a key point of contact within the vendors organization that advocates for the customer)
- Extending direct capabilities to the indirect channel, including training, business development, and marketing support in addition to the products and services portfolio
- Global consistency, which was a major need for larger multinational companies

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

In this IDC MarketScape assessment, support services providers must be able to maintain either servers, storage, or networking assets in a datacenter environment (details are provided in the section that follows) and have a minimum support revenue of \$500 million per year to be included in this assessment.

Datacenter Equipment Support

- **Enterprise networking equipment:** This provides the classifications and definitions for the four major markets covered in IDC's enterprise networks research: routers, LAN switches, enterprise VoIP equipment, and wireless LAN equipment.
- **Datacenter networks:** A datacenter can be located at a service provider or an enterprise. The components of a datacenter infrastructure include network equipment, servers, and storage. Datacenter network infrastructure forecasts the network infrastructure that is purchased by enterprise and service provider datacenters. This includes spending on network equipment, such as routers, LAN switching, secure content and application delivery, WLAN, optical, and

network management/OSS, as well as spending on enterprise connectivity software and products that provide the network infrastructure for IBM mainframes.

- **Servers:** The servers category comprises all server hardware sales for all purposes, applications, and industries, including volume (servers with an ASP of <\$25,000), midrange enterprise (servers with an ASP of \$25,000-500,000), and high-end enterprise (servers with an ASP of >\$500,000). Primary server segmentations are based on server class/price band, chip type, and operating system (OS).
- **Storage systems:** Storage systems include disk storage systems, tape automation and tape libraries, and optical automation.
- **Storage networking infrastructure:** Storage networking infrastructure comprises switches based on the Fibre Channel or FICON standards that connect servers, storage systems, and other devices to a storage area network.

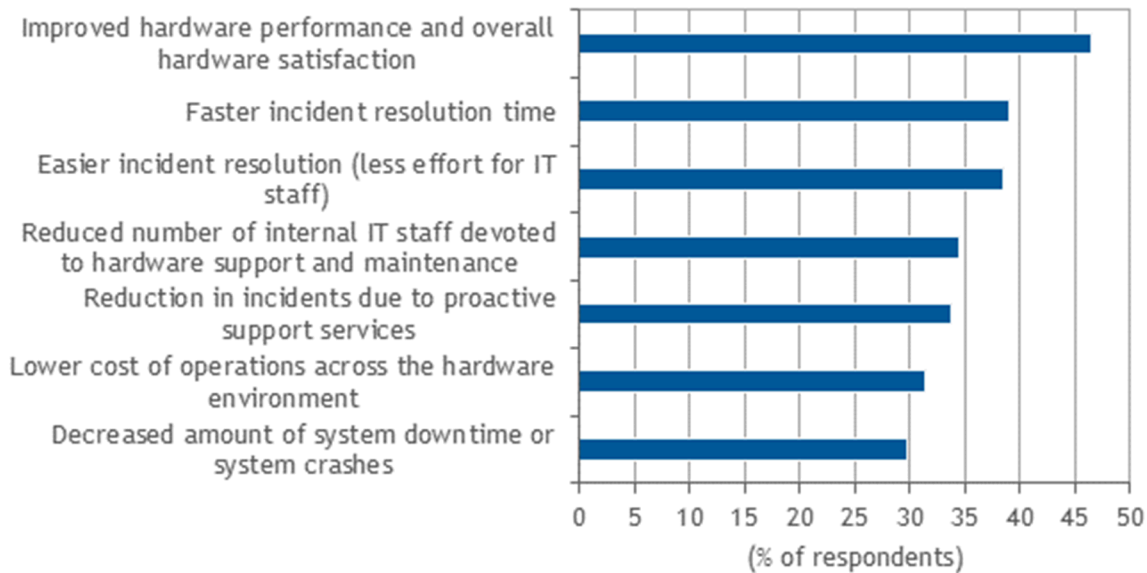
ADVICE FOR TECHNOLOGY BUYERS

Owing to the very mature nature of this market, all vendors provide a very high level of support (both from an ability and a portfolio perspective) and look for a provider that matches the abilities you need from a technical perspective and complement your internal staff. IDC surveyed globally 1,234 customers and asked what the top 3 benefits of using support services were, and the top response was to get more performance and value out of the assets they purchased. This shows that customers are looking to get a better experience with their assets. Figure 2 shows the other responses – the other notable response was help reduce IT staff time on supporting and maintaining the environment.

FIGURE 2

Top 3 Benefits of Using Support Services

Q. Based on your experience, what are the top 3 benefits your organization gets from support services?



n = 1,234

Source: IDC's *Worldwide Enterprise Support Services Customer Satisfaction Study, 2022*

In the same study, 85% of enterprises mentioned services, and in particular support services, as a key differentiator when choosing a vendor to purchase datacenter systems. IDC recommends evaluating your own internal IT and find the skills gaps and how vendor services can fill that gap. This is a key indicator that services do matter and is one of the big differences between OEM and ODM providers (OEMs having a robust services portfolio). Relationships, single points of contacts, and technical account managers were also specifically called out when interviewing key vendor customers, stating that those relationships were key when working with a particular provider. IDC recommends looking for vendors that invest in deepening a relationship and not just selling systems. Also topping the list of key needs by enterprises include:

- Technical expertise and effective communication of staff
- Support of the software-defined layer (hypervisors and/or operating systems)
- Upgrading and patching without downtime
- Proactive and preventative support services (notifications; ability to identify, diagnose, and resolve issues before they impact the environment, parts replacement, and health checks)

Security and audit management, self-support, and the use of proactive/preventative services topped the list of frequently used features of a services contract.

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.

Cisco

Cisco is positioned in the Leaders category in this 2022 IDC MarketScape for worldwide support services.

Cisco has taken a big step by turning the "support" organization into the CX organization.

Cisco's strategy for professional and support services around its core portfolio of datacenter, cloud, networking, IoT, and collaboration is very sound. Cisco's base hardware support offer called Cisco Smart Net Total Care (SNTC) provides customers with a variety of choices for their network and compute environment, some of which are:

- Global 24-hour access to Cisco Technical Assistance Center (TAC)
- Access to online knowledge base, communities, and tools
- Hardware replacement options, including 2 hour, 4 hour, and next business day
- Operating system software updates and support
- Smart capabilities that provide installed base visibility, contract status and information on uncovered devices, relevant security and product alerts, and product EoX details
- Proactive and preventative services such as Cisco Solution Support, Cisco Business Critical Services, and Cisco Managed Services

Other core offers from Cisco's CX services include:

- **Software Support:** Using a SaaS-based model, Cisco provides its users with access to updates and support of all of the Cisco software products available to customers.
- **Cisco Solution Support:** Cisco Solution Support was specifically created to support multivendor and multiproduct solution environments and help customers navigate complex solution issues with a central contact point, making it simple to open a case and resolve issues with any product within their solution environment.
- **Cisco Success Tracks:** Subscription service designed to help customers remove the adoption barriers and realize the full value of your Cisco technology investments faster. This service connects with the right Cisco experts and resources, including insights, learning, and Cisco Solution Support, at the right time through a one-stop digital experience via the Cisco CX Cloud.
- **Cisco Business Critical Services (BCS):** Subscription and IT role-based services are powered by predictive analytics and automation capabilities with expert guidance to realize and maintain a more secure, efficient, and agile technology environment. Cisco BCS leverages machine learning, combined with consulting and intellectual capital, to help proactively identify risks and prevent issues.
- **Cisco Managed Services (CMS):** The services enable the management of Cisco technologies to maximize performance and provide continuous monitoring and management of the datacenter assets. With CMS, customers can identify and resolve issues quickly and accurately while retaining visibility and control of their datacenters. Customers utilizing these tools will have access to Cisco's experts with experience in datacenter and emerging technologies.

Cisco is still transforming to become a CX company. To that extent, Cisco CX aims to bring to bear the right portfolio of services at the right time in the decision-making process to help its customers accelerate through their business and technology challenges while helping them capture value and competitive advantage.

Strengths

- Worldwide, buyers of network services regard Cisco CX as delivering globally consistent capabilities driven by a large well-trained partner community.
- Cisco also excels in its ability to provide online self-help capabilities, which allow customers to resolve issues themselves, which can significantly speed time to resolution.
- Cisco has deep and experienced engineering base, through its own and its partners' technicians, and the extremely rich knowledge base that can be accessed through its online community.

Challenges

- Cisco should look to keep its overall services portfolio easy for customers to consume and understand.
- The Cisco CX organization must continue to message its customers and partners what the evolution of CX is as a philosophy and as a business unit (BU) and how it will impact Cisco's customers' network, cloud, security, and hybrid work initiatives.
- Cisco should continue to focus on expanding training for partners associated with Cisco CX portfolio, especially in advanced managed support, innovation use cases, and new software-based technologies. Most professionals in Cisco's ecosystem have deep knowledge of the

company's traditional networking and datacenter technologies and will require similar resources to implement the CX portfolio.

Dell

Dell is positioned in the Leaders category in this 2022 IDC MarketScape for worldwide support services.

Dell Technologies has made investments in a robust support strategy and continues to expand the core support offerings. The company has developed a broad range of capabilities in an easy-to-consume manner (Dell ProSupport Enterprise Suite) to help customers achieve their innovation goals. The tools and technology provide IT managers easy access to expertise and actionable insights related to their datacenter environment, allowing them to adopt the technology solutions that meet their business requirements without requiring them to have specific in-house expertise to support it. Dell Technologies' service portfolio has offerings designed to address the new realities and challenges being faced by IT organizations. This includes continued evolution and focus on delivering more outcome-based experiences throughout the life cycle of the product and expansion to specialized support for solutions for offers such as Dell APEX.

ProSupport Enterprise Suite provides an easy-to-consume portfolio that customers can choose from to suit their particular support needs. IT staff can face a wide range of challenges each day. Some of these require expert tech-to-tech support, while others need the fastest possible parts dispatch. Some of the benefits of ProSupport for Enterprise include:

- 24 x 7 phone and remote access to Dell Technologies certified experts with local language support
- The opportunity for customers IT staff to become certified for online self-dispatch, enabling them to bypass phone troubleshooting and dispatch parts or labor using one portal
- Single point of accountability for escalation management with customer-defined severity levels and the option to choose mission-critical support or an enterprisewide contract
- Global command centers to manage critical situations, monitor all mission-critical onsite dispatches, and provide proactive crisis management during events such as natural disasters
- Collaborative support for select third-party hardware and software vendors
- Proactive monitoring, issue detection, notification, and automated case creation for accelerated issue resolution enabled by secure connect gateway technology
- Onsite service after remote diagnosis to match the target response objective needed by device

Customers looking for the next level of support can choose ProSupport Plus for Enterprise, which touts the following in addition to what is included in ProSupport:

- Advanced troubleshooting from an engineering team that understands the entire Dell Technologies' infrastructure solutions portfolio
- An assigned service account manager (SAM) who acts as its services advocate, ensuring efficient communication and smoother support experience, and for customers with Dell ProDeploy Plus for Enterprise, the SAM is involved throughout the process, bridging deployment to support
- Third party software support providing a single point of accountability for any eligible third-party software installed on the customers' infrastructure system, whether they purchased it from Dell Technologies or not

- Predictive analysis for issue prevention and optimization enabled by secure connect gateway solutions and semiannual systems maintenance to keep systems up to date with installation of latest firmware, BIOS, and drive updates to help improve performance and availability

Strengths

- Investments in a wide range of data-driven services technologies, from secure connect gateway for connectivity to self-service capabilities through TechDirect to a robust data visualization and insight portal with MyService360 and through integration with other product portals such as CloudIQ for a seamless customer experience
- A unified services portfolio that spans all Dell Technologies products, making it easy for customers to choose the services that are right for their needs
- The ability to provide globally consistent support through training programs, a large distribution network, and partnerships ecosystem

Challenges

- With such a broad portfolio of assets, it can be difficult to communicate all support capabilities to all customers, which can create a disconnect in what customers receive with the support they purchased.
- Keeping customers educated on their portfolio and communicating the results of some of the proactive things they are doing for their customers should be addressed, which can be by showing the value of the support the customer is receiving.
- Partners need to be brought further into the fold to continually enhance renewals and upsell of support services.

Hitachi Vantara

Hitachi Vantara is positioned in the Major Players category in this 2022 IDC MarketScape for worldwide support services.

A cornerstone global information technology vendor, Hitachi has been providing enterprise storage solutions since 1989, with a particular focus on delivering high-end systems to Fortune Global 1000 enterprises. This is reinforced in the company's support offerings, which are delivered by over 1,000 engineers and 12 global support center locations, providing 24 x 7 x 365 support for the company's enterprise customers.

Hitachi Vantara's support services approach is to provide options that match the customers' requirements. These support offerings incorporate elements of the company's full suite of services to help organizations design, implement, manage, and support an environment over a long period of time. The support program provides access to Hitachi Vantara's resources and personalized processing that allows business to innovate and grow and not worry about day-to-day storage operations. Hitachi Vantara has multiple paths customer can take, allowing them to choose what is right for them. The following represents the company's current support offerings:

- **Weekday Basic Support** provides routine maintenance during local business hours, next business day onsite support, and continuous remote monitoring. The key to this solution is that even at this lower end of their support offering, Hitachi Vantara monitors the environment.
- **Standard Support** offers aggressive onsite response times, preventative maintenance, and microcode updates during local business hours for mission-critical environments, along with the features offered in basic support.

- **Premium Support** is Hitachi Vantara's white-glove offering that provides immediate support on a 24 x 7 x 365, with the most aggressive onsite abilities and parts replacement on a 24 x 7 basis.

Hitachi Vantara also has a preferred customer portfolio, which helps augment the previously mentioned support portfolio that includes abilities such as:

- Block time support for expert assistance for planned activities not covered under the previously mentioned portfolio
- Service account manager, which is a must for large environments (These SAMs create a tight-knit relationship between your organization and Hitachi Vantara.)
- Multivendor support providing that single point of contact for support issues

Hitachi has a great presence on a global basis, which is one of the top reasons customers choose vendor support.

Strengths

- Excellent capabilities on a global scale for mission-critical storage arrays, with deep technical capabilities
- Simple portfolio for ease of use and decision making

Challenges

- IDC has observed that customer awareness for Hitachi Vantara's broader portfolio beyond storage and its capabilities to deliver holistic solutions that address broader business challenges continues to remain limited.

HPE

Hewlett Packard Enterprise (HPE) is positioned in the Leaders category in this 2022 IDC MarketScape for worldwide support services.

Overall, IDC views HPE Pointnext Services as being committed to its strategy to evolve into a service and solutions-led company, and this can be seen by the aggressive push of HPE GreenLake Ede to Cloud Platform (which includes HPE Pointnext Complete Care). HPE has placed an emphasis on services to assist customers on their digital transformation (DX) journey. Over the past couple years, the organization has streamlined and enhanced the support portfolio, everything from offering more in the base warranty to refreshing the portfolio with new offers – HPE Pointnext Tech Care and HPE Pointnext Complete Care (replacement to HPE Proactive Care [Advanced] and HPE Datacenter Care).

IDC's understanding of the HPE Pointnext Services strategy is to focus on services that align with customer requirements for high-value services. As such, HPE Pointnext Services is investing and refining its service portfolio: services that "follow the box" such as integration and performance services, which will increase solution adoption and satisfaction; services that "go out with the box," such as support, which are strategic and critical for solution success such as configuration and replatforming; and services that "go out before the box." These services are strategic consulting-led services that help accelerate DX initiatives. The capabilities within this suite aim to bring together various stakeholders and align IT initiatives with business priorities. HPE Pointnext Services also provides support/operational and managed services across a wide range of multivendor hardware and software products.

Strengths

- Investments in the technology and software platforms to become more proactive and predictive with the company's managed support services and HPE GreenLake cloud services
- Becoming a services-led organization where HPE is more concerned with solving an outcome than selling a system
- Continual expansion of support offers starting with the base warranty and extending that to HPE Pointnext Complete Care with global consistency and abilities around the offers (HPE does an excellent job of enhancing existing offers with new abilities rather than creating new service offers.)

Challenges

- HPE needs to keep partners and customers educated on portfolio changes and how to extract the most benefit from the company.
- HPE will need to continually train its existing workforce as well as its partner community on how to sell a service-led solution, especially HPE GreenLake cloud services.
- Customers are still leery of being "connected." This hampers the ability for the vendor to be, either fast reactive or proactive, in their abilities to add real value. Educating the customers and assisting them on how to get connected and the value creation from being connected needs to be addressed and doing that on an ongoing basis.

Huawei

Huawei is positioned in the Major Players category in this 2022 IDC MarketScape for worldwide support services.

Huawei Enterprise HiCare Services is Huawei's product support service that provides technical assurance to Huawei's customers. Huawei HiCare assists customers in maintaining high network reliability and sustainable system operations with comprehensive, technical support. HiCare services are available with advanced hardware replacement or onsite hardware replacement options that include next business day and 4-hour parts delivery, with 24 x 7 access to Huawei's Support-E online knowledge base, product documentation, software and licensing support, training, and information to assist with product operations and maintenance. Abilities provided are:

- Technical Assistance Center Support helps customers access the Huawei Technical Assistance Center 24 hours a day and 7 days a week to assist with product use, configuration, troubleshooting issues, and other requests. Huawei will respond to customers within 30 minutes for priority 1 calls, 60 minutes for priority 2 calls, 2 hours for priority 3 calls, and NBD for priority 4 calls. (The response time is from the time TAC accepts your service request to the time a technical support engineer first contacts you.)
- Online Self-help Support Huawei provides technical and general information on Huawei products with product manuals, configuration guides, and network maintenance cases. After obtaining website access permission, a customer can view or download helpful documents and self-support tools and get latest product information.
- System Software Updates keeps the networking technology up to date with the latest system software features and system improvements within the licensed feature set. Huawei provides system software updates that include bug fixes and maintenance and minor releases. Huawei also provides the rights to new software update releases as made generally available by Huawei. You will perform the installation of software updates, unless otherwise deemed necessary by Huawei.

- Advance Hardware Replacement entitles a customer to receive advance replacement of hardware after Huawei deems a spare part is necessary and a return material authorization (RMA) number is generated. The replacement equipment may be new or equivalent to new in performance and reliability. If the product is no longer in production or is out of stock, Huawei will provide another type of equipment or part with performance equal to or better than the original. Huawei provides a 90-day warranty from time of shipment or will honor the remainder of the initial warranty period for product replacement.

Strengths

- Offering solutions by vertical is a key strength of Huawei. Huawei does a very good job of looking after what the business is trying to accomplish and will customize solutions to match their customers' needs.

Challenges

- There are challenges keeping partners and customers educated on portfolio changes and how to extract the most benefit from them

IBM

IBM is positioned in the Leaders category in this 2022 IDC MarketScope for worldwide support services.

IBM has the ability to help customers with large multivendor environments as well as sophisticated network architectures. IBM's strength is its ability to offer its support on a global basis, with a white-glove feel, which appeals to large enterprise customer. IBM Technical Support Services (TSS) can help enterprises maintain availability and IT performance across network, datacenter, cloud, edge, and new workloads with integrated maintenance and technical support for multivendor hardware and software solutions. TSS' portfolio of services is designed to help prevent unplanned downtime with proactive support, and when issues do occur, resolve them faster through advanced technologies for better uptime. Customers can choose the proper service level for their solution that suites their business need, which include:

- Base Support is truly device oriented and well suited for test and dev environments that are not critical to the business.
- Enhanced Support provides customers with a single point of accountability and direct access to technical resources with accelerated response times.
- Proactive Support includes all of the previously mentioned features plus life-cycle management including asset management, system monitoring, and automated services for a proactive response experience. IBM also provides preventative support, letting customers know what they should be doing on the systems to keep them running at peak performance and availability.

IBM extends the life of the datacenter and the life cycle of IT assets with IBM's life-cycle management services, including server virtualization, storage automation, and middleware optimization. These support services allow IT managers to defer procuring new IT equipment. At the same time, these services increase the efficiency of the systems that are already in place in terms of power, cooling, space, and personnel time. In terms of virtualization, most datacenter managers have already virtualized the "easy workloads," and they do not know where to go with more complicated virtualization projects in terms of time, resources, and skill sets while providing a strong ROI for the business.

Strengths

- IBM's global presence, multivendor abilities, and partnerships make it a great fit for large enterprises.
- Customers state that the partnerships IBM creates at the higher levels of the C-suite allows IBM to truly understand the business needs of the customer, and in return, the C-suite of the customer has access to IBM executives.
- Proactive/preventative care is something IBM has been doing a long time with phone home, and now with Watson, IBM's abilities in this area will accelerate.

Challenges

- The fact that IBM Services can sometimes be perceived as expensive and difficult to navigate (Survey respondents indicated that while the cost for services is at a premium, they are generally extremely satisfied with the quality and value of the services they have received for the price paid.)
- Keeping customers on these larger fairly expensive datacenter footprints
- Proper messaging and education of partners and customers of what services landed where with the split of some of IBM services to Kyndryl

Juniper

Juniper is positioned in the Major Players category in this 2022 IDC MarketScape for worldwide support services.

Juniper provides different support levels and capabilities to match customers' needs. Highlighting Juniper's offers is Support Insights, which offers a cloud-based, AI-driven support platform that provides holistic visibility and insight across an organization's installed Juniper networking devices. This foundational, automated support is included as part of Juniper Care and helps organizations better operate and optimize network assets through actionable insight, analytics, and robust reporting about the network. This data includes:

- Operational state of network assets
- Patching and firmware levels with detailed actionable items on how to resolve out-of-date software
- Information on asset location and whether that asset is EOL or EOS
- Device compliance and security information to identify whether there are any network issues

Juniper Support Insights complements the company's proven AI-driven support and operations capabilities by extending automation to ACX, EX, MX, PTX, QFX, and SRX platforms.

Designed to address the operational and support requirements of a wide range of Juniper's customers, Juniper Support Insights makes the process of connecting to the cloud, collecting data, and curating insights easy and secure through:

- **The choice of Device Direct to Cloud (DDC) or Device to Collector to Cloud (DCC) connection and data ingestion modes:** The latter includes a fully managed Lightweight Collector (LWC) with streamlined provisioning. Both connection modes feature software in place operation, which obviates the need to upgrade or install software on either collector or network devices.
- **Adherence to a principle of least necessary device fact data collection to help with security and privacy:** Zero-Residual Footprint (ZRF) and the use of ephemeral computing ensures that

no data artifacts are stored anywhere permanently and helps avoid data leakage. Further, no personal identifiable information (PII) is ever used, and all Transport Layer Security (TLS) flows are encrypted.

- **Dynamic scalability with each Lightweight Collector designed to handle large deployments and support for up to 20,000 network devices**

Strength

- Juniper has excellent global presence and continually invests in its support as well as other services portfolios.
- Juniper is continuing its investment and expansion of proactive support capabilities and provides good online resources to provide fast self-help abilities.

Challenges

- Adoption and full utilization of Juniper Support Insights will continue to require the education of customers and of the partner community. They will need to be assured of the noninvasive, agile, and secure operational nature of the solution. Education of the customer will be key around its security aspect.
- As more support interactions become proactive and automated, the importance of each in-person interaction for reactive support increases substantially and delivering a high-quality experience is critical.

Lenovo

Lenovo is positioned in the Major Players category in this 2022 IDC MarketScape for worldwide support services.

Lenovo has put a lot of effort in building out its datacenter service portfolio and has done very well in a relative short period of time. Lenovo's leadership has created the SSG team to deliver upon its promise to be more focused on services and solutions. SSG has combined all services and solutions from across the company into a dedicated organization. By integrating the current service teams and capabilities from across the business groups, SSG is driving transformation for Lenovo by working with the business groups to drive growth across smart verticals, attached support services, managed services, and as-a-services offerings under the TruScale brand (which applies to everything the company sells) and integrated outcome-based solutions that combine hardware, software, and services. Customers have stated that the XClarity tool set provides excellent troubleshooting capabilities and actionable systems insights; these abilities will be key as we transition from support to customer experience and as-a-service models.

At the heart of Lenovo's support offering is preconfigure support, which is offered in three levels:

- **Foundation** is an upgrade to the base warranty to keep nonmission-critical server, storage, and networking hardware in working order. Foundation provides next business day onsite response during normal business hours, 5 days per week, covering onsite installation of all replacement parts. Optionally businesses can extend foundation services with coverage up to 5 years.
- **Essential** provides all of foundation plus improved uptime for core business workloads and safeguards for sensitive data. Essential also provides 4-hour onsite response, 24 hours a day and 7 days a week, with onsite installation and replacement of damaged parts as well as "your drive your data" retention services.

- **Advanced** provides all the benefits of essential services, plus the ability to maximize uptime for mission-critical applications and workloads, which include 2-hour onsite response or 6-hour Committed Service Repair (varies based on geography), 24 hours per day, 7 days per week.
- **Premier Support** can be layered across all the previously mentioned offers and provides direct access to skilled technicians, helping improve the stability of datacenter operations as businesses embrace increasingly complex technologies. This offer is meant to allow enterprises the ability to focus on business outcomes rather than day-to-day IT tasks. Benefits include:
 - Faster problem diagnosis and resolution
 - Single point of contact and end-to-end problem resolution via a dedicated Premier Support phone number
 - Live answer by skilled technical experts to resolve your issues quickly 24 x 7 x 365
 - Advanced Lenovo technical resources go beyond traditional hardware support
 - Collaborative third-party software support
 - On-demand remote system analysis

Lenovo also provides all the right add-on services such as technical account managers, health checks, and select enterprise server software support (which is critical considering hypervisor and O/S support is high among customer needs and wants from support vendors).

Strengths

- Lenovo has created a Services and Solutions Group (SSG) to focus on services and solutions.
- Lenovo has excellent global presence and is investing in tools such as XClarity, which customers use and appreciate.

Challenges

- Lenovo will need to continue to educate its customers on new service offerings and get them to move from basic support services to some of the new premium abilities they are now in position to deliver.
- Lenovo will also need to focus on how to authorize and educate its channel partners on a globally consistent scale to help manage and support these offerings and expand penetration into the SMB market with these new services abilities.

NetApp

NetApp is positioned in the Major Players category in this 2022 IDC MarketScape for worldwide support services.

NetApp offers a spectrum of support offerings to align to customers' needs. All of the services are offered globally and are supported by teams of global field engineers and a worldwide network of parts-stocking locations in multiple depots. NetApp supports a multitude of systems deployed in more than 150 countries. Support options include:

- **SupportEdge Standard:** For systems that do not require Premium support but need to be up and running for other noncritical applications. SupportEdge Standard delivers service options to ensure availability.

- **SupportEdge Premium:** For customers that want a greater level of support, this offer combines innovative remote troubleshooting and resolution capabilities, with expert onsite resources as needed.
- **SupportEdge Expert:** To optimize security, availability, and operation of NetApp solutions with access to the Active IQ Digital Advisor and its AIOps capabilities, this ability may enhance the support experience with personalized abilities such as managed software upgrades and periodic system health reviews. It can also accelerate issue resolution with priority queueing and direct routing to level 2 support for software issues.
- **SupportEdge Advisor:** Support to keep NetApp systems secure and running with predictive, proactive support features, which enable the most value from your NetApp solution:
 - Optimize security, availability, and operation of the solutions with access to Active IQ Digital Advisor and its AIOps capabilities.
 - Meet your availability requirements with optional parts delivery and replacement upgrades.
 - Control costs with flat rate, predictable pricing across the life cycle of the solution.

NetApp works heavily with partners and other organizations within NetApp to provide global service coverage and high availability. Automated prevention activities improve the customers' experience through AutoSupport, which automates the identification of issues and creates action plans and when required the proactive delivery and replacement of the systems parts prior to failure.

Strengths

- NetApp has excellent global presence and continually invests in AutoSupport as well as other proactive support capabilities.
- NetApp has good online resources to provide fast self-help abilities.

Challenges

- NetApp will need to continue to educate its customers (and partners) on new service offerings and get them to move from basic support services to Expert and Advisor abilities, which the company is now in position to deliver.
- SaaS and cloud-based offers and as-a-service storage are changing the landscape. NetApp will need to keep pace with other offers in the marketplace.

Oracle

Oracle is positioned in the Major Players category in this 2022 IDC MarketScape for worldwide support services.

Oracle has clearly developed an understanding of intellectual capital as it applies to support. The body of knowledge and the understanding of any particular problem are increased by an order of magnitude when exposed to a community that is likely to have encountered the problem before. Oracle offers knowledge bases (My Oracle Support) of frequently asked questions, forums connecting common users, and information on individual customer contracts, critical patch updates, and security patches. My Oracle Support is the portal available to customers of Oracle products, while Oracle Advanced Customer Support Services provides continuous operational optimization for support customers. Online support options also lower support costs for Oracle, and the company posts critical patch updates to products and security alerts on its website.

Automation of Support

While maintaining knowledge bases of support information is a long-standing method of reducing support delivery cost, Oracle has successfully further reduced resolution time through the use of automated tools. Out of the ACS group has come a technology that is used to capture customers' use of Oracle applications, "push" updates and patches to customers, and provide information to support customers remotely. The data captured by Oracle can be compared with that of other customer sites to create proper use case methodologies and best practices when it comes to supporting these environments. Support offers include:

- **Oracle Premier Support** provides essential software updates and new releases, proactive support tools, and 24 x 7 services to help mitigate risk.
- **Proactive Support Program** keeps systems healthy by maintaining optimal system integrity and performance and helps detect problems before they impact operations. This service also helps with the upgrade process, making sure there is no incompatibility issues.
- **Advanced customer Service** provides the customer with service packages to meet their needs, whether they want fully managed or partially managed solutions. This allows customer to give as much control or risk to the vendors that they are comfortable with.

Strengths

- Since Oracle owns the full stack (software and hardware), they can provide a more holistic support experience to the customer.
- Oracle has excellent global presence and continually invests in My Oracle Support as well as other proactive support capabilities.
- Oracle has good online resources to provide fast self-help abilities.

Challenges

- While the cost for support is predictable, customers do feel that the cost is fairly high.
- Moving solutions downstream is difficult, which has stagnated growth of the services organization.

Pure

Pure is positioned in the Major Players category in this 2022 IDC MarketScape for worldwide support services.

Pure Storage's technical support services are proactive, reaching out to customers when alerts in CloudAssist monitoring system brings attention to a problem (Customers may discover issues and contact Pure directly). Throughout the support process customers are notified according to the severity level of the issue they face. When a problem is brought to Pure Storage Support, it already knows a lot about what's happening, because the alert includes a description of the problem, the time it began, and how critical it may become. In a case like this, the support engineers (TSEs) evaluate the alert to determine how to respond. If appropriate, they promptly contact the customers' designated contact person, filling them in on the situation.

CloudAssist is an essential part of Pure Storage's overall strategies that allows the technical support team to monitor every connected device and then proactively identify potential problems. It operates through a secure link where logs are transmitted every 30 seconds to a secure server, enabling detection of performance issues and error rate trends. When a problem is discovered, an alert

immediately reports the issue so that action can be taken quickly. Records of previous alerts and other diagnostic operations provide a history of significant events to inform the troubleshooting effort.

Pure Storage has three support levels, all of which are 365 x 24 x 7 with 15-minute response time, the only difference between the levels is when a replacement is onsite if needed best effort – next business day or 4 hours.

Strengths

- Pure Storage has made great investments in technology to be truly proactive and predictive through being connected.
- The support portfolio is very efficient and easily digestible, partners, and clients know exactly what to expect.
- Owing to Pure Storage's highly automated and proactive capabilities, the company can provide customers with a "low touch" support model, which streamlines the support process.

Challenges

- Owing to Pure Storage's "low touch" support model, customers as well as partners will need to be educated as to how this support model is different than others.
- Too much automation could create the lack of "face" time, which may prevent customers from buying more premium services, and a lack of "value" may be perceived.

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

Support Services

Support services comprises telephone support, remote diagnostics, electronic support, onsite support, extended warranty, predictive/preventive maintenance, parts repair, and inventory/asset management services. IT help desk services dedicated to supporting a customer's application are considered support services. Hardware support services can be provided by either the hardware vendor or a third party and are either attached to the hardware or included in a site agreement.

Managed Support Services

Managed support services refer to high-end or mission-critical support services. Under the terms of a managed support services offering, the provider is responsible for proactively alerting customers about events or situations that are occurring in their environment or on discrete technology assets. Under the terms of a managed support agreement, the provider's legal liability is limited to providing an alert to the customer. After the alert has been sent, the provider may have additional responsibilities under the terms of a traditional support agreement. For example, the provider may be bound by response or resolution times as described in a support agreement. Examples of alert types for events are:

- Down system or device (This refers to a device that is no longer functioning.)
- Poorly performing system or device (This refers to a device or technology environment that is not performing optimally.)
- Potential problem (This refers to alerting a customer regarding a situation that could result in a down system.)

Once the vendor has alerted the customer, the customer can then decide how to address the alert. Typical customer decisions would be to:

- Address the alert internally
- Have the vendor that provided the alert address the problems under the terms of a support agreement
- Have another third party (i.e., a vendor that did not provide the alert) address the alert
- Ignore the alert

Strategies and Capabilities Criteria

The importance of a firm's characteristics to support success and relevance of the particular support challenge combined with IDC's opinion about the impact those elements have on selection of firms implies a unique weighting of these elements when evaluating a firm's overall strategies and capabilities to address market opportunity and realizing market success. Table 1 shows the providers' ongoing strategy to provide support on an ongoing basis, whereas Table 2 shows the support providers' capabilities.

TABLE 1**Key Strategy Measures for Success: Worldwide Support Services**

Strategies Criteria	Measure for Success	Weight (%)
Growth strategy	Multivendor support growth	23.0
	Overall growth of services	
	Enabling growth through partners	
Functionality or offering strategy	Rate of introduction of new solutions in core areas	15.0
	Adjacent services (implementation services and consulting services)	
	Plans in place for support of offering functionality to handle duty deferral	
Innovation/R&D pace/productivity	Customer assessment of vendor's innovation	31.0
	Investments in front-end tools	
	Investments in back-end tools	
Delivery	Ability to scale (vendor)	26.0
	Delivery center (number and locations)	
	Local versus global resources	
Financial/funding	Investment in marketing	5.0
Total		100.0

Source: IDC, 2022

TABLE 2

Key Capability Measures for Success: Worldwide Support Services

Capabilities Criteria	Measure for Success	Weight (%)
Functionality or offering	Lights out management	15.0
	Predictive analytics	
Portfolio benefits	Ability to report on metrics that demonstrate improvements in support delivery over time (dashboard for tickets)	21.0
	Availability and simplicity of upgrades/updates/patches (through portal or vendor website)	
	Availability of online self-support and ability to easily connect with vendor (customer portal with knowledge bases, forums, and automated diagnostics)	
	Contract management and renewal process (responsiveness to adds, changes, and deletes)	
Customer service delivery/customer satisfaction	Ability to provide multivendor support	64.0
	Analyst's judgement of customer satisfaction	
	Client relationship/account management	
	Customer perception of value for money	
	Multiple ways to contact support (telephone, email, and web chat for incidents)	
	Overall satisfaction — customer voting	
	Software support technical expertise	
	Technical expertise (customer input)	
	Total cost of ownership	
Total		100.0

Source: IDC, 2022

LEARN MORE

Related Research

- *What Capabilities Are Key When Selling Support Services Contracts?* (IDC #US48781222, January 2022)
- *Worldwide Datacenter Systems Support and Deployment Services Forecast, 2021-2025* (IDC #US48261221, October 2021)
- *Tactics: Possible Areas of IT Savings to Free up Cash for Digital Transformation* (IDC #US47015820, December 2020)
- *The Cost of Downtime in Datacenter Environments: The Cause and Effective Measures to Alleviate* (IDC #US46505517, June 2020)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of several providers participating in the worldwide support services market. IDC MarketScape is an evaluation based on a comprehensive framework and a set of parameters that assesses providers relative to one another and to those factors expected to be most conducive to success in each market in both the short term and the long term.

"Support services is a mature market, with most vendors being capable of delivering support services. This IDC MarketScape aims to differentiate those firms that are investing in innovation to meet customers' needs. This requires a strategic road map for helping enterprise customers innovate, differentiate, and compete on technology, operational, and business playing fields. To do this successfully, support providers must have the right mix of people, process, and technology to meet the demand," said Rob Brothers, program vice president, Datacenter and Support Services.

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. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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