IDC Analyze the Future

COMPETITIVE ANALYSIS

IDC MarketScape: Worldwide Datacenter Hardware Support Services 2013 Vendor Assessment

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IDC OPINION

This study assesses nine support providers that are participating in the worldwide datacenter hardware support services IDC MarketScape model. Vendor selection included providers with existing support portfolios and range from the OEM to third-party maintainers. 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:

- Leveraging new technologies such as the cloud, mobility, big data, and social media to develop support solutions and business models that enhance customer experience and drive operational costs down
- Developing proactive methodologies such as machine-to-machine support solutions to help drive operational efficiencies and reduce costs and downtime to the customer
- Developing tools and automation to streamline the support process (Examples of this can be more automation in the contract renewal process, giving the user more control over contract and inventory management to more proactive tools to identify issues in the environment before they happen.)
- Extending direct capabilities to the indirect channel, including training, business development, and marketing support in addition to the products and services portfolio
- Continued expansion into emerging markets such as Eastern Europe, Asia/Pacific, and Latin America

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IN THIS STUDY

This study is IDC's datacenter hardware support services provider assessment of the worldwide support services market using the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in this important but slow-growing market. This study is composed of two sections. The first section describes characteristics that IDC believes lead to success in the support services market. These characteristics are based on vendor surveys conducted for this study, IDC's end-user research, and analyst observations of best practices.

The second part of this study is a visual presentation of the resulting vendor analysis in a single bubble chart. This display concisely exhibits the quantified scores of the reviewed vendors along two axes — strategies and current capabilities — which determine if the vendor is a Leader, a Major Player, a Contender, or a Participant. In addition, vendor market size (as determined by direct support revenue) is indicated by the size of the bubble. This section also provides vendor summaries that discuss IDC's positioning of each vendor in the market along with commentary on strengths reflected in their scoring, as well as opportunities for improvement. The document concludes with IDC's essential guidance to vendors in support of growth and improved offerings.

Please note that this IDC MarketScape study includes datacenter hardware support services only.

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 a review board of IDC experts in each market.

IDC analysts base individual vendor scores, and ultimately vendor positions, on the IDC MarketScape graphic, on a detailed evaluation of each vendor, publicly available information, end-user experiences, and the input of a review board composed of IDC experts in the market in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability. The evaluation process involves several steps, including the following:

- A questionnaire is completed by each vendor to characterize the scope of each vendor's core technology portfolio, as well as to highlight solutions that the vendor considered to be primary differentiators.
- Business briefings are conducted with each vendor to learn about each group's growth, sales, marketing, customer service, and offering strategies as well as background information about business performance, offering differentiators, and key market trends. The briefings are initiated with a request to deliver the briefing based on a standard set of questions. The briefings are used to score the strategy sections of the IDC MarketScape.

- Reference interviews with approximately five customers from each participating vendor gauge the customers' experience working with the vendor and the overall complexity of the project. Customer reference interviews are built around a standard set of questions. Customer reference interviews are used to score different elements of the capabilities section of the IDC MarketScape.

Hardware Support Services Market Definition

IDC has defined two specific areas of hardware support services:

- Datacenter support services covers all assets that reside within the four walls of a datacenter; these items include servers, storage, and networking. Datacenter support tends to be more stringent as far as service-level agreements (SLAs) go and face more scrutiny when those SLAs are not met.

- Deskside or client device support services assets include items like printers, monitors, PCs, laptops, tablets, and smart devices. Note that these devices generally don't carry the same type of SLAs or support needs that datacenter assets require.

SITUATION OVERVIEW

The worldwide market for support and deployment services has all but stagnated in the past year, with a market size of approximately $63.2 billion. Vendors will need to take a fresh look at the support market and create offerings that are higher in value and more creative to satisfy the needs of the enterprises complex infrastructures. Enterprises have seen the value of what IDC defines as the 3rd Platform, which consists of mobile, social, cloud, and big data solutions and applications. Vendors are developing portfolio strategies to help manage and maintain the IT environments that host these new solutions. In this iteration of enterprise IT, organizations are required to support legacy systems, converged infrastructures, cloud-based applications, and software-defined storage, networks, or datacenters in heterogeneous environments. The datacenter manager has to compete with resources such as *Rackspace* and *Amazon Web Services* to keep the corporate enterprise datacenter relevant. That said, the increasingly critical role of vendor-supplied support services is highlighted in addressing these emerging IT environments going forward. Among the array of factors to consider when maintaining and managing the datacenter are:

- Increasing uptime assurance and security to deliver a high-quality end-user experience

- Matching IT needs with proper support contracts and contract consolidation for proper SLA coverage and cost savings

- Utilizing proactive services through tools and automation for faster issue resolution

- Simplifying and enhancing the support experience with a single point of contact for support issues and simplified service contracts

- Dynamic online contract and inventory management systems to allow the end user access to the location, condition, and SLA on all datacenter assets as well as the ability to track and open tickets on those assets

Introduction: Today's Infrastructure Trends

In today's rapidly changing world of IT, enterprises are deploying extensive, complex infrastructures that enable critical business processes and provide secure and easy access for end users from a variety of desktop and mobile devices. These advanced infrastructures allow access to real-time data that can greatly increase productivity, allowing businesses to respond quickly to market dynamics to achieve strategic advantage.

In this environment, the traditional challenges associated with IT maintenance and management is changing dramatically. Yesterday's challenges included managing virtual machine sprawl and dealing with isolated silos of resources and the disproportionate investment of IT resources in maintenance versus innovation. Those challenges are now being replaced with new ones, such as how to support converged infrastructures, cloud-based applications, and software-defined environments. As businesses move forward and modernize their IT infrastructure to take advantage of big data, social, and mobile opportunities, IT vendors are also investing in these areas to provide better technical support for their customers' emerging requirements.

Today's environments are dramatically more productive and cost-effective. However, the need for easy access to management and performance information, rapid problem identification and resolution, and proactive guidance on best practices from technology experts has not diminished. Datacenter managers must continually improve on their processes to prevent line-of-business owners from looking externally for resources. Enterprise datacenters need to provide IT resources in a manner that is easily consumable by their IT users. To that end, vendors must provide the platforms, associated services, and highly trained engineers that customers rely on for new converged, software-defined, virtualized, and legacy systems. Providing this level of support ensures that the performance needs of end users that rely on these datacenters are met. It is also not enough for vendors to support just their own technology with software-defined infrastructures on the horizon; they must also be able to provide support for the other hardware and software providers involved in the delivery of an organization's workload.

Managing operations in these new environments will continue to present significant challenges for resource-strapped IT departments. In addition, talent shortages in areas such as big data, software-defined architectures, and cloud computing are already apparent. IDC believes that as a result of all these factors, CIOs and IT managers will increasingly look to external support providers for help in building, managing, and maintaining the enterprise IT infrastructure of the future. In turn, support providers will need to modify their offerings in line with these changes. Customers are looking for multiple attributes, including more personalized support that is responsive to their unique needs; proactive products, tools, and technology to avoid the business risks of downtime; and an uncomplicated support experience.

IDC MarketScape Vendor Inclusion Criteria

In this IDC MarketScape assessment, vendors that were included had to meet the criteria set forth in the sections that follow. Support providers must be able to maintain most of the types of equipment in the datacenter mentioned below and provide specific services at a minimum to be included in this assessment.

Datacenter Equipment

IDC categorizes datacenter equipment into three categories:

- **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.** IDC categorizes storage technology into three major categories:
  - **Storage mechanisms:** IDC measures specific storage mechanisms that are the building blocks of a storage system. Specifically, IDC tracks the following storage mechanisms: hard disk drives (HDDs), including 3.5in., 2.5in., 1.8in., and 1.0in. media; tape drives and automation; optical/removable drives, including CD/DVD-ROM, CD-Rec, and DVD-Rec; zip/magneto-optical (MO)/removable and large form factors (5.25in. optical, 12–14in. WORM); and solid-state drives (SSDs).
  - **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.

The specific services criteria include:

- **Contract length** — Minimum one-year contract
- **Environments** — Cover distributed office environments and/or datacenters
- **Coverage** — Includes one or more of the following support service offerings:
  - Basic — At a minimum, provide out of "base" warranty support on a 8 x 5 next business day (nbd) basis.
  - Midtier — At a minimum, provide out of "base" warranty support on a 24 x 7 x 4 basis.
  - Premium — At a minimum, provide out of "base" warranty support on a 24 x 7 x 4 basis and some level of OS or virtualization software support.

In addition, hardware datacenter support services should include most of the following:

- **Portals** — Ability to provide the following capabilities, including:
  - Manage contracts online (add, delete, change)
  - Manage multivendor contracts
  - Ticket management (open, close, and track tickets)
- **Proactive/remote capabilities —** Be able to provide the following capabilities:
  - Monitor datacenter assets —To view and monitor datacenter assets remotely
  - Administer datacenter assets —To administer datacenter assets onsite/remotely
  - Prefailure warnings — Ability for the monitoring system or device to predetermine if it was going to fail (i.e., disk drive faults prior to failure)
  - Ship on fault — To ship a part automatically when a fault occurs while monitoring an environment
  - Firmware/patch management — To assist with and plan firmware and patching
- **Multivendor support capabilities —** Be able to support other vendors' assets in the datacenter
- **Ongoing optimization** — Ongoing optimization with proactive management using the provider's resources to continuously manage the environment toward contract goals

- **Change management** — A formal program with education and incentives to get employees and their managers to achieve and sustain contract SLAs
- **Residency services** — To provide onsite engineering abilities on a full-time basis
- **Support on a global basis** — To provide support in multiple countries
- **Self-help capabilities** — Forums, social media
- **Provide a single point of contact** — To provide a "technical account manager" for a customer's datacenter

Market Strategies and Capabilities

This section includes definitions of market-specific factors and their weightings that were used to evaluate the vendors in this IDC MarketScape. The managed print and document services market exhibits characteristics that suppliers must take into consideration when crafting a future strategy and in leveraging existing capabilities to their best advantage. The factors were weighted because IDC believes that some are more important than others in maximizing market opportunity and realizing market success.

This IDC MarketScape is an analysis of support providers completed in the first half of 2013; the definitions and weighting have been adjusted for almost every criterion in response to dynamic market conditions.

Strategies

The strategies category focuses on high-level strategic decisions and underlying assumptions about offerings, customer segments, business, and go-to-market plans for the next three to five years (see Table 1). This category considers whether or not a vendor's strategies in various areas are aligned with customer requirements (and spending) over that time period.

TABLE 1

Key Strategy Criteria Market-Specific Definitions and Weighting: Datacenter Hardware Support Services

Strategies Criteria	Subcriteria	Market-Specific Subcriteria Definitions	Subcriteria Weighting
Offering strategy	Functionality or offering road map	Detailed road map for functionality provides additional value to customers including predictive analytics capabilities (if they don't already exist) plus additional innovations that are clearly articulated with release plans and schedule. Strategy matches a vendor's size and market position.	2.0
	Delivery model	Plans are in place for support of offering delivery model(s) that will match customers' shifting preferences for adoption/consumption in the next five years (i.e., chat, remote support, onsite services).	2.0
	Cost management strategy	This criteria measures strategies for developing and producing support offerings at a competitive cost by lowering operational cost and passing those savings along to the customer.	3.0
	Portfolio strategy	This strategy measures diverse support portfolio to meet the current and future needs of the market.	3.0
Offering strategy total			10.0
Go-to-market strategy	Pricing model	The supplier's pricing model strategy is directly aligned with customers' preferences for payment (e.g., license, service, per seat, per transaction).	3.0
	Sales/distribution strategy	The sales/distribution strategy is aligned with the way customers want to buy the offering (e.g., online, offline, direct, indirect).	2.0
	Marketing strategy	There is a robust game plan/strategy for all relevant facets of marketing (e.g., brand development, promotion, demand generation) that matches where revenue is predicted to flow over the next five years.	2.0
	Customer service strategy	Customer service strategy effectively retains customers and continues to innovate in customer retention and service areas, with the implication that the company will be able to achieve the level of service and support demanded by customers over the next three years, *or* as a low-cost provider has a plan in place for customer service that will be universally embraced.	3.0
Go-to-market strategy total			10.0

TABLE 1

Key Strategy Criteria Market-Specific Definitions and Weighting: Datacenter Hardware Support Services

Strategies Criteria	Subcriteria	Market-Specific Subcriteria Definitions	Subcriteria Weighting
Business strategy	Growth strategy	Management has a strong formula for growth for the company and one that aligns well with the market trends anticipated over the next three to five years.	3.0
	Innovation/R&D pace and productivity	The company's innovation model maximizes its potential to generate market value and invest in support initiatives.	4.0
	Employee strategy	The company's strategy for attracting, motivating, and retaining talent maximizes its opportunity for creating market value.	3.0
Business strategy total			10.0

Source: IDC, 2013

Capabilities

The capabilities category focuses on the capabilities of the company and product today, here and now (see Table 2). Under this category, IDC analysts look at how developed and good a vendor's capabilities are that enable the vendor to execute its chosen strategy in the worldwide market.

TABLE 2

Key Capabilities Criteria Market-Specific Definitions and Weighting: Datacenter Hardware Support Services

Capabilities Criteria	Subcriteria	Market-Specific Subcriteria Definitions	Subcriteria Weighting
Offering capabilities	Functionality/offering delivered	Current offerings, architectures, methodologies, and best practices match directly to current customer needs and with current vendor skills to deliver maximum customer benefit.	2.0
	Delivery model appropriateness and execution	The offering is delivered today in the way(s) that matches customers' preferences for adoption/consumption.	2.0

TABLE 2

Key Capabilities Criteria Market-Specific Definitions and Weighting: Datacenter Hardware Support Services

Capabilities Criteria	Subcriteria	Market-Specific Subcriteria Definitions	Subcriteria Weighting
	Cost competitiveness	The cost structure for this offering is competitive, yet supports the flexibility required to adjust to the pricing models that customers want today.	2.0
	Portfolio benefits delivered	Customers can quantify the support experience.	2.0
	Global offering	Support services can be consumed globally with the same level of service.	2.0
Offering capabilities total			10.0
Go-to-market capabilities	Pricing model options and alignment	The pricing model is currently aligned with customers' preferences for payment (e.g., license, service, per seat, per transaction).	2.0
	Sales/distribution structure, capabilities	The current sales/distribution structure is aligned with the way customers, especially those in high-growth market segments, want to buy (e.g., online, offline, direct, indirect).	2.0
	Marketing	The company's marketing organization is aligned with the priority customer segments and executing well.	2.0
	Customer service	The company's service organization is aligned with priority customer segments and executing well.	3.0
	Other go-to-market capabilities	This is a placeholder for any industry-specific issue that cannot be slotted into one or more of the go-to-market capabilities categories.	1.0
Go-to-market capabilities total			10.0
Business capabilities	Growth strategy execution	Management is executing well on its formula for growth for the company (e.g., by acquisition, organic growth).	5.0
	Acquisitions and investments	The company's pace and productivity of innovation is generating market value, whether through acquisition or investment.	5.0
Business capabilities total			10.0

Source: IDC, 2013

FUTURE OUTLOOK

IDC's opinion is that selective "outsourcing" (looking for specific areas of the datacenter to utilize a lead service provider) of IT will become a part of the enterprise organization over the next three to five years. Some of today's businesses have already taken this step to cosource their IT assets. This evolution can be considered IT as a service (ITaaS) or infrastructure as a service (IaaS), offered in many forms with few standards and principles governing the management of these new models. The IT department of today is evolving from being the "protector of the information world" to becoming a "broker" of IT services, offering mobility and own-device freedom to employees, and fast and effective client experiences to customers.

The CIO therefore no longer has to discuss and debate with the business his/her requirements for IT resources but rather the value and cost benefits of each brokered IT service. Business expectations dictate the need for standardized, efficient enterprise-class services, which, in turn, mandate the CIO to drive down both capex and opex, lower business risks imposed by IT failures and capacity issues, continuously increase the quality of user experiences, and be agile enough to align with business direction and decisions.

The next-generation IT has made it much easier for CIOs to deliver against this mandate because of its consumption-based approach (pay only for what you use, only when you use it). This model drives down costs and improves efficiencies as new services can be launched much sooner and at much lower costs, and quality is guaranteed and governed by SLAs with outsourcing service providers. Look for support providers to help deliver a more holistic SLA-based support experience based around two factors: uptime guarantees and performance indicators. This support will be based off workload and not on individual components in a datacenter. Companies like Rackspace and Amazon are already accomplishing this, and these are the providers datacenter managers need to emulate.

IDC MarketScape: Worldwide Datacenter Hardware Support Services Market Vendor Assessment

IDC's assessment for the datacenter hardware support services market represents IDC's evaluation of which vendors are well positioned today, through current capabilities, and which have strategies that will allow them to gain market share over the next few years. Positioning on the y-axis reflects the vendor's current capabilities and how well those capabilities are aligned to customer needs, as well as how well a vendor is delivering and executing 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 the next three to five years. The strategies category focuses on high-level strategic decisions and underlying assumptions about offerings, customer segments, business, and go-to-market plans.

Figure 1 shows each vendor's position on the x-axis and y-axis. Additionally, a vendor's market size (as determined by support services revenue) is indicated by the size of the bubble. Positioning on the grid is broken down into various groupings that

reflect the combined view of a vendor with respect to both strategies (x-axis) and capabilities (y-axis).

The groupings are defined as follows:

- Leaders are companies that have led and continue to lead the market in both breadth of offering and strategic intent. These companies have made investments in hardware support service portfolios, go-to-market enablement, and delivery capabilities that set them apart from other vendors.

- Major Players are companies that have established and proven offerings in the market and have demonstrable success in delivering and delighting customers. These companies are "shadowing" the Leaders and exert competitive pressures via new capabilities, channel initiatives, and other differentiable capabilities that raise the bar for all vendors in the market.

- Contenders are companies that have defined managed print and document services capabilities but have delivery resources, technology infrastructures, and go-to-market coverage that are still being developed.

- Participants are companies that are in the process of developing a support service program or have initiated limited releases.

Based upon the final scores (on the x-axis and the y-axis), we make the following high-level observations about the various players (see the Vendor Profiles and Assessment section for more detailed vendor analysis):

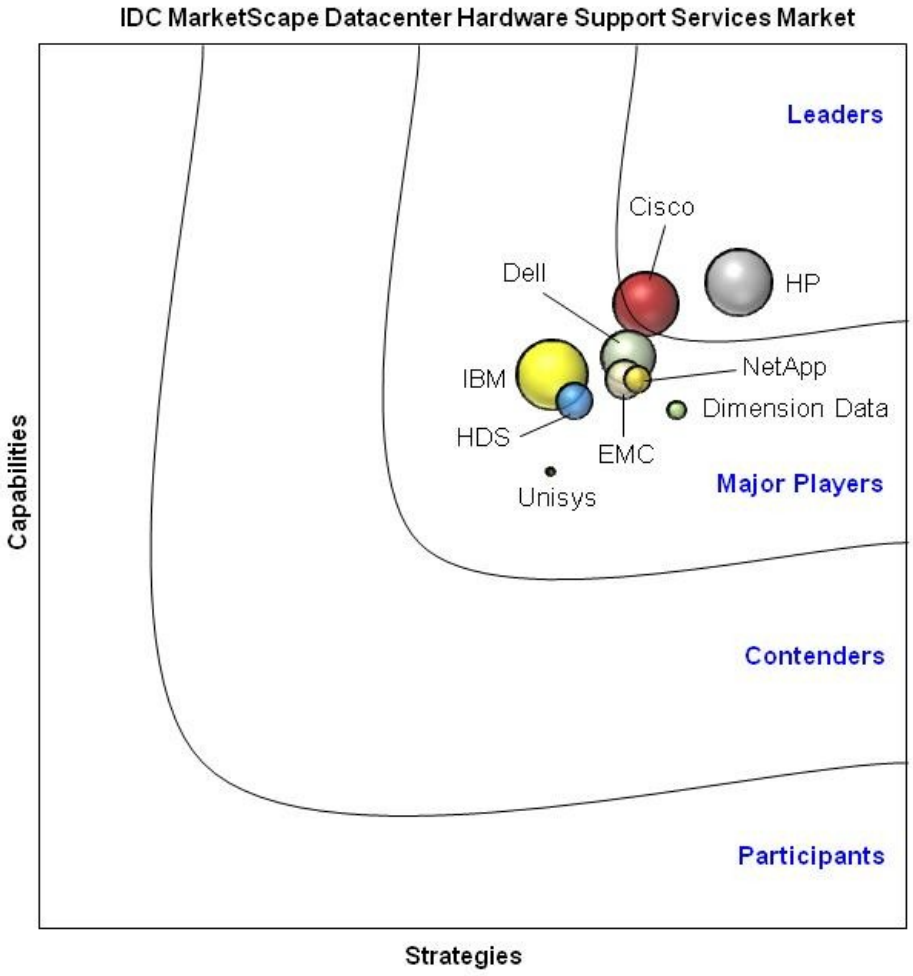
- There are only a couple of vendors in the leadership position, and this is by a narrow margin. Leaders in datacenter hardware support services in IDC MarketScape assessments have scored the highest among all players in the strategies and capabilities categories. They have robust portfolios and well-defined go-to-market strategies targeting growth globally, across company size, and through both direct and indirect distribution channels.

- The rest of the vendors are Major Players. As Major Players, they have demonstrated in-depth knowledge of the market, the trends impacting the market, and how to leverage those trends for sustained growth.

- No vendors ranked as Contenders or below because of the maturity of the market space.

FIGURE 1

IDC MarketScape: Worldwide Datacenter Hardware Support Services Vendor Assessment



Source: IDC, 2013

Vendor Profiles and Assessment

This section covers the various vendors that were assessed in this IDC MarketScape and provides insights into their strengths.

HP

HP is a Leader in this IDC MarketScape because of the large investments it made to actively grow support, and grow it through multiple channels. The company has showed innovation — from the design of the system all the way through to the portfolio offerings and delivery. HP's offerings provide customers with a broad range of services that will help embrace new technologies like mobile, cloud, and big data.

These offerings are designed to help customers choose the right service that best suits their enterprise's needs. Offerings include:

- HP Datacenter Care
- HP Proactive Care
- HP Foundation Care

HP's portfolio is in response to the company's identification of a number of key customer expectations centered on the notion of an enhanced service experience. Enterprise customers have shown a desire to have a more personalized experience, which suggests a particular emphasis on two areas: single point of contact and the ability for support contracts to offer appropriate levels of customization.

HP Datacenter Care

HP has been making continual enhancements to its offerings; HP Datacenter Care is one of those offerings. This option can provide customers with a support team to address server, storage, and network infrastructure sourced from multiple suppliers under a single consolidated service contract. This capability is designed to reinforce the single-point-of-contact value proposition and avoid cross-vendor "finger pointing." Other products in the Datacenter Care portfolio include:

- **Datacenter Care Primary Service Provider** consolidates vendor management and service delivery into a single service agreement, helping track inventory and providing a matrix on performance and availability.
- **Datacenter Care Flexible Capacity Service** is an as-a-service infrastructure option, which can help datacenter managers provide opex options and self-service features and functionality to its users.
- **Datacenter Care for Cloud** allows for multivendor support while orchestrating SLAs across a cloud environment and providing expert guidance on managing application workloads.
- **Datacenter Care for Hyperscale customers** provides on-premise resources and support options to help with large scale-out compute environments.

HP Proactive Care

HP Proactive Care represents a higher-value support service leveraging new product technology and infrastructure investments designed to achieve proactive support. HP Proactive Care builds upon the HP Foundation Care base to provide additional features to customers facing the challenge of managing converged, virtualized, software-defined, and cloud-based environments. The program leverages:

- Remote support automation tools, via HP's Active Insight Architecture
- "Direct to Expert" support, bypassing traditional level 1 support processes to gain quick access to HP technology experts and single-point-of-contact focus throughout the resolution process

- Proactive advice and consultation on firmware and software management

These features help customers get more value out of the IT assets they have purchased and may provide a higher level of customer satisfaction when it comes to supporting the IT environment.

HP Foundation Care

HP Collaborative Support

HP Collaborative Support is intended to provide a first and single point of contact for initial hardware and software support needs. It is designed to shift the burden of deciding whether the problem is hardware or software related from the customer to the support professional. If the incident is related to a selected third-party software product and can't be resolved by standard procedures, HP contacts the vendor on the customer's behalf under the terms of the existing support agreement. (It should be noted, however, that this feature is not intended to replace the need for a support contract with the third-party vendor.)

HP Foundation Care is a portfolio of reactive hardware and software services with different levels of support and hardware/software balancing options. Foundation Care extends standard warranties for HP products and provides hardware and software support options above and beyond HP's current offering. It can be obtained from HP directly or authorized partners. Support is available in multiple response levels to address the specific needs of customers.

Insight Online Services

As part of an ongoing effort to enhance the customer support experience, HP has developed an integrated management and support offering that automates support process for HP products. It begins with deployment of support tools and continues with remote monitoring with a personalized online support portal for ongoing operations and management.

HP Insight Remote Support is connected to HP Insight Online. With HP Insight Online, customers can access IT information anytime, anywhere to remotely manage their infrastructure. HP Insight Online can automatically display devices monitored by HP Insight Remote Support and lets customers track service events and support cases, view device configurations, and proactively monitor the status of their HP warranties.

Key features of HP Insight Remote Support and HP Insight Online include:

- **Personalized dashboard.** The HP Insight Online Dashboard integrates customers' support and product information into a "single pane of glass" view for management of their IT environment. The dashboard allows customers to share their IT information with other users within their organization and/or HP Authorized Resellers for recommendations and advice.

- **Service events.** This feature provides online monitoring and management of devices using HP Insight Remote Support. Users can view all key event

information, such as severity, problem description, date and time generated, status, and related support case ID.

- **Contracts and warranties.** This feature allows users to track contract and warranty status by device and by contract. Users can see what contracts they have as well as their associated access rights and when they expire.

These offerings are fairly new to the market, and HP will need to spend time and effort on educating customers and resellers to the true benefits these offerings bring to an IT environment. HP will also need to work on easily deploying these tools into enterprise IT to easily capture all of the data. Overall, HP's strategy is sound; how well it gets implemented will be the true test over the next couple of years.

Cisco

Cisco is a Leader in this IDC MarketScape and is one of the few vendors that has seen some growth over the past few quarters in its support services revenue. Most of that is because of an increase in the sale of its x86 product line and the continued uptake, and now renewal, of "Smart" packages. Cisco's strategy for basic and advanced support services around its core portfolio of networking, x86 systems, collaboration, and communications is very sound. The primary deliverable, called Smart Services, 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 two-hour, four-hour, and next business day
- Operating system software updates
- Expansion of the Smart Service offers and operating-level services (Remote Management Services [RMS], FTS, NOS) that provide proactive and preventive services

Cisco Remote Management Services enables management of Cisco technologies to maximize performance and provide continuous monitoring and management of the datacenter assets. With RMS, 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.

Two key benefits of Cisco's support are its deep and highly experienced engineering base, through its own and its partners' technicians, and the extremely rich knowledge base that can be accessed through its online community. In a conversation, Joe Pinto, senior VP of Technical Support Services, emphasized the pervasive technical capabilities of Cisco's own and its partners' engineers and how dedicated they are to training and certification.

Every year, Cisco enhances its Smart Services offerings as its technological capabilities expand, creating richer proactive alerts, more robust monitoring tools, and deeper systems analytics. The ongoing search to detect and fix issues before they occur drives Cisco to use tools that will benchmark customer environments against one another to help determine the best practices for configuration and installation of complex datacenters.

IDC feels Cisco should continue to market its abilities to support other offerings, in particular its x86 blade (UCS) environment. Cisco is very well positioned to provide comprehensive offerings to its customers and its partner community to support x86 virtualized environments. Cisco's experience with FlexPod and VCE provides an excellent inroad to expand the firm's support for complex heterogeneous environments. IDC recommends enhancing Cisco's tools (Prime) to accommodate monitoring of other vendors' equipment and virtualization software. With Cisco's partnering strategy, the ability to accomplish this should not be a far reach. Overall, Cisco provided a good overview of its core support offerings (networks), but the company lacked insight into UCS and future support strategies.

Dell

Dell, a Major Player, has also made extensive investments in a robust support strategy. Dell has developed a broad range of support offerings (ProSupport) to help enterprises achieve their goals. Dell's tools and technology provide IT managers with easy access to expertise and actionable insight 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's portfolio includes service offerings to address the new realities and challenges being faced by IT organizations. With the Dell ProSupport Enterprise Suite, customers get the most out of their investment with the support expertise and insights Dell is known for across the globe.

Dell's standard premium offering, ProSupport, provides customers with coverage on both Dell and non-Dell hardware. Dell ProSupport offers highly trained experts around the clock and around the globe to address a customer's IT needs, minimize disruptions, and maintain a high level of productivity. Dell has more than 24,000 field engineers, 5 global command centers, and over 550 parts distribution centers, providing a consistent global support experience.

ProSupport includes the following:

- Flexibility to choose support based on the criticality of specific systems and the complexity of the environment
- Single point of accountability for hardware and software issues
- Consistent experience regardless of location or language
- 24 x 7 x 365 access to certified hardware and software experts, making it easy for customers to access the expertise they need when they need it

- Collaborative support with over 195 third-party vendors, allowing Dell to act as the single point of contact and troubleshoot customer issues with non-Dell software and hardware to minimize finger pointing (Hypervisor and operating system support provides seamless troubleshooting for enterprise systems.)

- Onsite parts and labor response options including next business day and two- or four-hour mission-critical support.

Dell ProSupport Plus

New to Dell's portfolio is ProSupport Plus, which provides an even more proactive and preventive IT support experience. IDC and Dell have identified key support features that customers are looking for, including a more personalized support experience with higher-level engineers, better reporting and critical patch notification abilities, strategic support planning, and insight into best practices. In response to these needs, Dell created ProSupport Plus with no minimums or sitewide requirements; it is accessible to every customer.

ProSupport Plus includes all the features of ProSupport, plus the following:

- Direct access to senior-level technical support engineers enhances the customer support experience by providing immediate advanced troubleshooting without the need for escalation, resulting in faster resolution on critical systems.

- A dedicated technical account manager (TAM) is a single point of contact who knows the customer's environment, processes, and business goals. The TAM also offers assistance in escalating support issues if needed and provides monthly reporting and recommendations.

- Monthly health checks, reporting, and recommendations provide the customer and the TAM with a view of a system's overall performance and health, which enables proactive and preventive measures to be taken on a given system.

Dell ProSupport Flex for Datacenter

Dell has also developed a ProSupport offering designed to address the unique needs of larger customers with hyperscale datacenters and the resulting challenges that accompany the management of such environments. ProSupport Flex for Datacenter offers a compelling solution for Dell's biggest customers with the most complex environments:

- Dedicated technical and field support teams are trained on the customer's specific environment, configurations, and processes, guaranteeing a completely personalized experience for complex environments.

- A dedicated technical account manager with remote/onsite and part-time/full-time options provides customers with the ability to choose the right amount of account management for their business.

- Onsite parts and labor response options ensure the fastest resolution for environments that require it.

- Monthly health checks and customized reporting and recommendations provide the customer and the TAM with a view of a system's overall performance and health, which enables proactive and preventive measures to be taken on a given system.

- Enterprisewide support (including multivendor support) covers the entire datacenter, providing a single support vendor for wall-to-wall datacenter support, thereby simplifying and streamlining the contract process.

- A tailored support plan for the customer's operations staff provides clear processes and procedures for the datacenter staff, streamlining the overall support experience for the customer.

Support Tools and Technology

Dell and its customers share the goals of eliminating the need for support and minimizing the customer effort required to keep systems available. Dell is supporting its customers' need for self- and automated support with a suite of resolution-driven tools and technologies to increase productivity and uptime and improve performance:

- SupportAssist includes remote monitoring, automated data collection, and automatic case creation. This solution integrates with Dell's enterprise products and Dell OpenManage Essentials. This technology provides health checks and proactive recommendations for ProSupport Plus and ProSupport Flex for datacenter customers.

- TechDirect is a global self-service online portal that allows IT to dispatch parts and labor and manage support cases. It also provides visibility into service contract expiration.

- Case Management API is a fully documented and secure interface that allows direct help desk integration for customers to submit cases and check case status.

The ProSupport Enterprise Suite of services has evolved in response to Dell's identification of a number of key customer expectations centered on the notion of an enhanced support experience. Many dimensions inform the overall customer experience, including such factors as average problem resolution time and customer satisfaction. Dell will need to reach out to its channel community to get this message delivered and to get the tools needed to provide this higher level of support installed and implemented. If Dell can deliver and follow up on its messaging and deliver on the feature rich set it has created, the company should continue to see success in the support services space.

Dimension Data

Dimension Data (Di-Data), one of the two non-vendors in the mix, has been providing clients with multivendor support services for many years, at first focusing in the network space and then expanding to include most datacenter assets. This is one of the distinct advantages non-vendor support providers have, which is the ease in being able to provide support on many different assets due to their vendor-agnostic view of the datacenter. Dimension Data is a Major Player in this IDC MarketScape.

Dimension Data continues to invest in support services capabilities and offers a mature support services portfolio with proactive support offerings that will help manage the full life cycle of IT environments and optimize IT support spend. The market has had the need for a more proactive offering, and IDC has seen many come to market over the past two years. Dimension Data has embarked on a journey to develop a suite of proactive services, launched under the name Uptime v "x" in early 2013, which enhances its existing support portfolio and provides an improved service experience.

Dimension Data ensures a coherent and standardized approach toward support services, and some of its key areas of focus are:

- **Contract aggregation:** Dimension Data offers a single point of contact for all maintenance and support issues, regardless of the vendor or service provider involved.

- **Uptime maintenance:** Dimension Data supports the life cycle of datacenter assets, facilitates rapid response to incidents, and restores failed devices according to service-level agreements that suit the enterprises' business requirements. In detail:

  - **Incident management:** Dimension Data offers a single point of contact for all incidents around the world through global service centers and delivers according to agreed service levels.

  - **Engineer to site:** if an incident can't be resolved remotely, Dimension Data will send an engineer to the location.

  - **Parts to site:** Dimension Data dispatches replacement parts to meet agreed service levels. When replacement parts have been shipped, Dimension Data will manage the process of returning the faulty part.

  - **Multivendor management:** Dimension Data undertakes procurement, renewal, and management of all manufacturer (vendor) maintenance contracts. The company will also administrate any claims against the vendor for returned material.

  - **Services portal:** Dimension Data's portal offers online incident and request logging; moves, additions, changes, and deletes (MACDs) recording and standard reporting; online access to contract details; and incident and request reports.

  - **Subscription services:** Dimension Data will help implement software patches, minor feature releases, and major software upgrades.

  - **Service levels:** Uptime service levels are flexible, giving enterprises the choice of what is needed on particular workloads.

- **Uptime support:** Dimension Data provides extras or add-ons that can enhance the overall support experience, which include:

  - **License renewal:** Reminds customers when right-of-use licenses are due for renewal so there is no need to track multiple renewal dates

- **Configuration moves, adds, changes, and deletes:** Keeping the IT environment up-to-date with MACDs, freeing up your internal resources
- **Consultant on call:** Providing specialist, telephonic support for issues not related to a logged incident, such as configuration advice
- **Site-based services:** Resident technicians and the ability to supply spare parts at the customer location for the fastest reactive support
- **Assessments:** Includes performing and reporting on a range of predetermined assessment services
- **Service-level management:** Providing information to improve the stability of an infrastructure and the quality of service delivery through reports and reviews; also includes on-the-go access to the status of customer service through its Mobile Service Centre Application (Android and iPad).

- **Support assessments:** Support assessments allow companies to strike a more accurate balance between cost and risk. This ensures that customers' support and maintenance contracts are better aligned with their commercial and business objectives.

- **Insite monitoring:** Insite monitoring monitors a range of technologies at different service levels to help provide a more consistent service quality and stability, reduced cost, and respond quickly to changes, including:
  - **Monitoring and event management** monitors IT infrastructures, identifies events, diagnoses, and recommends steps for resolution. It also measures key performance and capacity metrics of IT infrastructures and generates reports used for incident prevention and capacity planning.
  - **Configuration management** is the ability to gather complete network device configuration data and monitor changes through specialized tools and applications developed specifically for this task.
  - **Service portal** provides real-time IT infrastructure management and technical information, allowing for a "drill down" to incident, problem, change, and configuration items.
  - **Carrier coordination,** wherein, if an issue falls outside of Dimension Data's purview to the carrier, the company will help coordinate support efforts with that carrier.

Dimension Data has direct presence in over 50 countries and extended support coverage through its preferred partner program. The company provides support in 13 languages across its 5 global support centers. Although Dimension Data has a robust support offering, providing support on state-of-the-art datacenter assets and proprietary hardware and software will always be an issue for "third party" support providers.

NetApp

NetApp has been expanding its presence in datacenters via the Flexpod offering (Cisco, VMware, NetApp converged infrastructure), and with that has been growing the support services business. NetApp is a Major Player in this IDC MarketScape. The company offers a spectrum of support offerings that aligns to customers' needs. All support services are offered globally and are supported by teams of global field engineers and a worldwide network of parts-stocking locations in ~300 depots. NetApp supports about 400,000 systems deployed in more than 150 countries. Support options include:

- SupportEdge Standard for complex, noncritical environments:
  - Remote technical support
  - Software support and updates
  - Auto Support suite
- SupportEdge Premium for complex business-critical environments:
  - Onsite support services
  - Some third-party product support (NetApp Unified Support)
  - Initial installation of storage system
  - Auto Support suite

The differentiator for NetApp is the AutoSupport family that helps efficiently deliver proactive support via a cloud-based service at no cost to the customer. My AutoSupport allows engineers to predict risks, mitigate support issues quickly, and ensure availability through a preventive approach to enterprise data management. NetApp has developed an integrated management and support experience that automates and simplifies the support process for NetApp storage systems. The following are key components of the AutoSupport family:

- **AutoSupport:** AutoSupport is an integrated monitoring and reporting technology that constantly checks the health of enabled NetApp systems. It provides troubleshooting tools and information, enabling an improved mean time to resolution and proactively collects and sends alerts to the customer's technical support personnel to let them know the status of their NetApp storage environment. The system can automate and accelerate parts dispatching, hence resolving issues for the customer more quickly.
- **My AutoSupport:** My AutoSupport is a cloud-based support service that works to provide customers with actionable intelligence and smart analytics to assess, model, and optimize storage infrastructures. My AutoSupport improves self-service support and operational efficiency of NetApp systems by providing proactive health checks as well as storage efficiency profiling that utilizes best practices in storage environments. Other features within My AutoSupport include:
  - **Fitness Dashboard —** This tool allows users to get a 360 degree view of their installed base, which provides basic configuration fitness of storage

elements. It summarizes risks, best practice gaps, remote support coverage, and end-of-support components. The dashboard also provides a snapshot of performance and storage efficiency, which gives users the flexibility to drill down to look at component detail.

- **System Risk Identification, Prioritization, and Mitigation —** Using known signatures identified by subject matter experts, NetApp proactively identifies risks in the installed base, categorizes these by impact level, and provides mitigation procedures. This allows customers to have a fit installed base as they are able to address these risk areas before they become serious issues.

- **Installed Base Management Dashboard —** Partners, in most cases, manage more than one customer. This partner-focused dashboard in My AutoSupport allows partners to go to a single place to see a comprehensive summary of all their customers' systems.

- **Storage Efficiency and Worldwide Benchmarking —** Users can model storage efficiency savings by selecting features that aren't already installed, and look at how their efficiency compares with worldwide averages.

- **My Reports —** This consolidated reporting feature allows users to generate on-demand reports or schedule pre-configured reports in a preset frequency, which can include detailed system configuration information, risk summary, and storage efficiency metrics.

- **Upgrade Advisor —** This feature allows users to generate a comprehensive plan for nondisruptive upgrading of NetApp storage devices.

- **NetApp Support Mobile App —** As the support workforce needs to do more with the time it has, the ability to check on a system's health from any device anytime becomes increasingly important. NetApp has developed a mobile support app that works with most smartphones and tablets enabling customers, partners, and NetApp internal employees to better support timely action on support cases and workflows.

- **Remote Support Diagnostics Tool (RSDT):** RSDT helps NetApp support engineers solve critical storage system issues without the need for customer intervention. RSDT automatically and securely uploads the appropriate log files to NetApp support engineers, which enables faster case resolution and helps minimize system downtime.

- **Support communities:** NetApp has several product and support communities including the NetApp Support Community, Customer Fitness Community, and AutoSupport Community. Users are encouraged to share best practices and challenges, codevelop content, engage in peer-to-peer support, and collectively solve problems.

NetApp provides a "single pane of glass" view into the health of a given NetApp environment. These are important features to assess when choosing the proper vendor for your storage needs. NetApp's focus is primarily on its own equipment; if

NetApp is looking to become more holistic in its approach to support, the company will need to broaden its capabilities to take a more multivendor approach.

It is important for vendors to constantly enhance the support experience for their customer base. NetApp is achieving this goal by providing automated support to its end users at zero cost. Customers of NetApp need only an active contract to take advantage of these services, and IDC highly recommends enabling these features. These tools provide insight on how to properly plan and execute systems growth strategies, but IDC studies have also shown that customers receive a better overall support experience when enabling proactive and preemptive remote support capabilities.

IBM

IBM is rated as a Major Player, with the company's strengths lying in its ability to cater to the high-end enterprise market. IBM has a broad range of offerings ranging from your basic break-fix support through proactive services. The company has the ability to help customers with virtual environments as well as sophisticated network architectures. While IBM's channel strategy is a little light, the company's ability to offer its support on a global basis appeals to the enterprise customer. IBM's pricing tends to be on the higher end of the scale and is not for everyone, but for the large enterprise looking to off-load a majority of its IT support needs to one vendor, IBM may be the right choice.

IBM Technical Support Services (TSS) can help enterprises maintain availability and IT performance with integrated maintenance and technical support for multivendor hardware and software solutions. TSS' portfolio of services is designed to help resolve issues — or even prevent problems before they occur — and to protect the IT environment during both warranty and post-warranty periods. Customers can upgrade service for in-warranty machines or extend post-warranty technical support coverage. IBM has technicians that can provide around-the-clock remote or onsite support with a single point of contact. Customers can choose the proper "ServicePac" (IBM's nomenclature for skuable support levels) that suites their business need.

IBM extends the life of the datacenter and the life cycle of IT assets with server virtualization servers, 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. IBM support services works with datacenter managers to support these complex Wintel workloads.

A common problem for datacenter managers today is making more time for their staff to focus on strategically critical projects rather than day-to-day support tasks. These day-to-day tasks need to be accomplished to keep the datacenter, IT, and the business running but are not adding incremental value to IT or the business. To solve the problems of today's datacenter and increase flexibility, efficiency, and reliability, IT needs to focus on incremental improvements rather than keeping the ship afloat. The

problem is that there are a finite number of IT staff members, so IT managers need a datacenter support service provider to accomplish maintenance and day-to-day chores, thereby freeing up internal IT staff to focus on helping the business.

To help off-load this burden, IBM offers Tivoli Live Monitoring Services. This service allows datacenter managers to have greater visibility into the incidents from their infrastructure without installing management tools. IT organizations are constantly looking for insight around availability, capacity, and energy efficiency. Tivoli Live Monitoring Services uses intelligent automation and policy-based alert monitoring to limit issues resulting in downtime. This ultimately frees up IT staff to focus on problems affecting business performance.

IBM's strengths are its global reach and the ability to deliver a holistic set of support services that identify interdependencies across the IT portfolio and provide analytics that can optimize across the entire life cycle of the datacenter. The challenge for IBM will be to take these abilities and better enable its channel partners to deliver the same set of services downscale from the high-end enterprise customer. Other areas IBM will need to invest in include a single pane of glass into the existing inventory of assets and contracts for its large enterprise customers, and provide pricing models that will help customers determine the overall cost for supporting their datacenters.

EMC

EMC, the largest of the storage companies, was also placed in the Major Player category. One of EMC's greatest strengths has been around tracking the total customer experience (TCE) when it comes to support, and some of the initiatives show how dedicated the company is to keeping a customer loyal to the EMC brand. EMC has been investing in and enhancing the following areas to ensure that continued loyalty from its customers:

- Customer engagement and communications helps in understanding the total customer experience when it comes to support and how improvements can be made in its life cycle.
- Online support is a huge area for most vendors. EMC looks to drive more adoption and expansion of its Customer Service Community Forums and promotion of multilingual chat capabilities. Encourage customer and partner peers to resolve each other's issues and facilitate self-service.
- Customized service delivery supports changes and evolution of service delivery, including the Elite Customer Care program and EMC Personalized Support Services.
- Social media engagement is an area still being developed by most vendors, and EMC is using this medium to drive promotional and marketing programs as well as leveraging for response to customer service issues and offering innovation; it builds upon the strategy to respond to all commentary and issues via social channels.

EMC was one of the early adopters for phone home support in its high-end storage arrays. EMC has a good long-term strategy to continue investing in and making this a

more feature-rich ability that will span across the company portfolio. It will include more online features like apps that can help customers more easily track how their datacenter is behaving as well as giving EMC engineers quicker access to critical customer data. To complement that, EMC is heavily investing in proactive, predictive service capabilities so it can help customers manage risk, and build upon the work it may have already done with EMC Secure Remote Support/remote monitoring tools. Other support abilities afforded to customers include:

- **Service Event Packs** address service events not covered under warranty or by an EMC Support Option with Event Packs. This provides organizations the ability to buy support on a more "ad hoc" basis.

- **EMC Online tools,** an area that EMC has put a lot of time and effort into, provides customers with access to live chat sessions, a support community, patch and software downloads, and an extensive knowledge base.

- **Personalized Support Services** include features like a dedicated technical account manager and/or support engineer, and software upgrade service and developer assistance to help with software issues.

EMC has also expanded the features to its Velocity Services Support program, which provides the foundation for channel partners to both resell and deliver support. There are two program tracks partners can join:

- **Remote support** provides access to the tools, methods, and EMC support, enabling the partner to handle up to and including level 2 remote technical support for its end-user customers.

- **Onsite support** provides access to the tools, methods, online support, and EMC technical experts to provide onsite support for customers needing break/fix services at their location. The Velocity Services Support program ensures that partners are trained and equipped to meet the support needs of their customers using EMC's products. Support delivery partners have access to EMC Global Services delivery methodologies and tools, EMC online support tools, and support escalation to advanced engineers for more complex issues.

EMC offers services from 620 service locations in over 150 countries around the globe, including a direct EMC service presence in over 50 countries. EMC's customer service team is made up of approximately 7,000 technical support professionals and is backed by an additional 8,000 EMC Global Services professionals.

Hitachi

Hitachi Data Systems (HDS) is a global provider of IT datacenter solutions, which includes a full breadth of support services. With a long history of providing advanced storage solutions focused on the evolution of virtualization and data management software solutions, Hitachi Data Systems brings over 20 years of experience to the enterprise datacenter. HDS is rated as a Major Player in this IDC MarketScape.

Over the years, Hitachi Data Systems has invested in its suite of support solutions and professional services to help organizations establish and maintain alignment

between IT and core business objectives. Recognizing that aligning with the ongoing and changing business needs of an organization is rarely accomplished through a one-time, project-based consulting and integration endeavor, Hitachi Data Systems has developed a holistic and ongoing approach to support, which is to help cultivate a deep partnership with IT organizations.

Hitachi Data Systems' services approach is through its Select Care Customer Support Program — a support offering that incorporates 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 Select Care Customer Support Program provides access to Hitachi Data Systems resources and personalized processing that complement existing maintenance services. With the Select Care Program, customers can upgrade service levels and streamline procurement of customized support. The program also packages assessment, consulting, optimization, and managed services to address ongoing customer problems and to help keep IT aligned with business goals. In particular, the Select Care Program is designed to maintain, preserve, and protect the value of the initial IT investment that enables a virtualized, efficient, and automated datacenter environment. Given that the Hitachi Data Systems Transformation Services offering is designed to initiate the transformation and establish continuous improvement processes, the ongoing nature of the Select Care Customer Support Program becomes an extremely valuable and critical approach for organizations to execute the continuous improvement processes and maintain their ability to deploy IT that aligns with constantly and rapidly changing business goals. The Select Care Program affords the IT organization the ability to sustain the integration gap over time by ensuring optimum levels of availability, performance, and capacity within the storage environment.

To address a broad spectrum of challenges among a wide variety of customer types, the Select Care Program is very flexible and customizable with multiple modules that offer:

- Premier levels of support to customers that desire direct and personal access to Hitachi Data Systems support resources
- Reporting, health checks, and dashboard tools to proactively ensure that the environment remains operating at optimum, baseline levels
- Options for Hitachi Data Systems personnel to proactively manage and align the organization's storage environment with established, ongoing service-level requirements

Hitachi also ranks very highly in the Major Player category and has a great presence on a global basis. Hitachi is lacking in some of the online contract management and automation tools that some of the other vendors have created, but active investments in these areas are underway and expect to see expanded offerings in this space. HDS is one of the only vendors to provide a mobile application to view the status of its Hitachi environment; look for advancements around this product to propel it further up the support ladder, especially if the company offers multivendor capabilities.

Unisys

Unisys, one of the non-vendors in the IDC MarketScape, scored well in the Major Player category, although sizewise it is very small compared with its competitors. Unisys' ability to scale multivendor support solutions made the company and Dimension Data unique entrants in this study. Unisys offers a comprehensive suite of maintenance products and premium proactive support services that help reduce the risk of downtime and looks to improve system performance and manageability. Unisys solutions are customizable to fit each customer's unique set of requirements. This is one of the major benefits when working with a third-party maintainer — its ability to scale a customized solution from the large enterprise down to smaller companies. The other benefit to working with third-party maintainers is the company's ability to provide multivendor support. Unisys portfolio of support services includes:

- **Extended hardware maintenance.** These hardware support services range from base warranty to premium maintenance for Unisys and non-Unisys products. The offering is made up of:
  - Warranty service upgrades
  - 9 x 5 four-hour response
  - 24 x 7 four-hour response
  - 24 x 7 two-hour response
  - 24 x 7 repair commitment
- **Extended software maintenance.** These software support services provide remote assistance via the telephone or the Internet 24 x 7, as well as onsite support for Unisys and non-Unisys software. Application support is part of this service and includes support for Unisys proprietary solutions and OEM solutions, and also provides the customer with a single point of contact for all issues related to that software. The offering is made up of:
  - 9 x 5 same-day response
  - 24 x 7 one- or two-hour response
- **Premium support services.** For enterprisewide mission-critical IT environments, Unisys offers premium support services that help customers more proactively. The services are made up of:
  - Support account manager
  - Onsite support specialist
  - Remote systems health check
  - Support consulting
  - Enterprise multivendor support

Unisys has global reach and an infrastructure that includes tools and automation, methodologies, and certifications that allow the company to be one of the few vendors that can provide a complete and comprehensive approach to support in multivendor environments.

Unisys' weaknesses revolve around issues that may require vendor assistance. If Unisys needs to reach back to the vendor for patching or firmware updates, this may slow the repair process, and since the company does not make the product, it is difficult for it to get the finite details of system issues. This is an issue that most third-party maintainers struggle with; this is a major reason only about 40% of enterprise IT uses TPMs to any extent.

ESSENTIAL GUIDANCE

IDC recommends utilizing support providers that continue to invest in proactive and preventative support automation and online tools; vendors that develop these will be able to lower their operational cost, which in turn should be able to provide a better level of service at a better price point to their customers. Clearly, the modern datacenter has transformed to provide virtualized, automated, and efficient delivery of IT as it aligns with the business needs of the organization. While the technology to enable this transformation is rapidly evolving, there is no one hardware or software product that will solve these complex support issues overnight.

There has never been more at stake for IT departments to succeed. Among the myriad decisions that IT organizations must make along this transformation process, the single decision to create a deep, long-standing partnership with a trusted technology and services provider will prove to be the most critical. Those organizations that ultimately succeed will realize that the bulk of the transformation will take place in the initial investment, when a services partner can maximize the consumption of new technologies by filling the integration gap. More importantly, successful organizations will also recognize the need to provide an ongoing partnership to help protect, preserve, and enhance the initial investment, which will extend overall value and lead to the greatest level of success in supporting changing business goals over time.

LEARN MORE

Related Research

- *Worldwide Clientless Remote Support Software 2013–2017 Forecast* (IDC #244467, November 2013)
- *Enterprise Datacenters and Third-Party Maintainers* (IDC #243610, October 2013)
- *Preventative Support: Keeping Costly Downtime Out of the Datacenter* (IDC #242497, August 2013)

- *Worldwide and U.S. Hardware Support and Deployment Services 2013–2017 Forecast: Support on the Slow Growth Path* (IDC #241886, June 2013)

Synopsis

This IDC study is IDC's datacenter hardware support services provider assessment of the worldwide support services market using the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in this important but slow-growing market.

"IDC sees the datacenter hardware support services market as a very mature space, with little disparity between support providers", says Rob Brothers, program director for Hardware Support and Deploy Services at IDC. "All support providers have very good offerings and well-established practices; hence the separation between vendors is very small."

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