IDC MarketScape

IDC MarketScape: Worldwide Hardware Support Services 2025 Vendor Assessment

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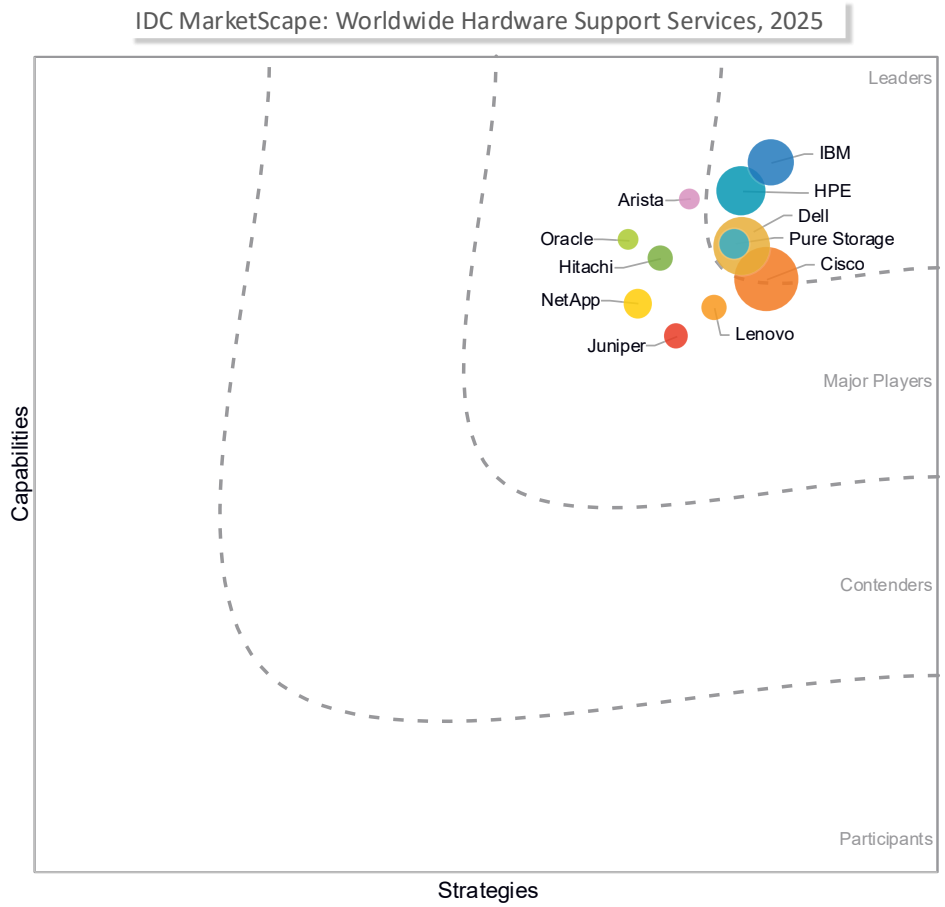
THIS EXCERPT FEATURES HPE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide Hardware Support Services Vendor Assessment



Source: IDC, 2025

October 2025, IDC #US53830325e

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Hardware Support Services 2025 Vendor Assessment (Doc # US53830325).

IDC OPINION

Organizations are seeking to create better outcomes through IT investments, and these efficiencies will be achieved via more agile IT infrastructure that supports better technical and operational IT outcomes.

IDC research has established that increased business agility, customer satisfaction, employee productivity, operational efficiency, and cost savings are the top business outcomes organizations want to achieve with their digital infrastructure investments. These outcomes are closely linked to an organization's digital technology, operations, and governance capabilities.

With AI and GenAI initiatives leading the charge, IT teams are now tasked with delivering business outcomes faster than ever before. IT professionals must closely align IT infrastructure with business outcomes and bring them to fruition quickly, with minimal disruption. The accelerating pace of changing business priorities and new technological developments is impacting IT teams that are already strained based on existing resources.

IDC believes these challenges transcend talent shortages: It is about having the right skills to clearly articulate to stakeholders how new digital technologies will drive the business forward, coupled with the ability to adopt new technologies and operating models. It is also about having the right business outcomes and KPIs to demonstrate IT value to the line-of-business owner and at the C-level.

For organizations with mature, highly skilled resources, these new technologies and operating models can be integrated into the workflows of the team. But for many organizations, especially with new GenAI technologies, this integration may be untenable. As a result, IT teams must rethink their team's maturity, culture, skills, resources, processes, and investments to quickly transform and achieve the outcomes required by the business. Organizations that need to shift focus, funds, and resources from day-to-day tactical operations to driving strategic business outcomes should utilize third-party professional services to enable IT teams to rapidly transform.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This study assesses 11 OEM hardware support providers according to the worldwide datacenter hardware support services IDC MarketScape model. In December 2024, IDC surveyed 1,112 enterprise customers for IDC's *Enterprise Support Services — Customer Satisfaction and Value Survey* and asked which OEMs provided best-in-class support for all of 2024. Vendor selection included the major OEMs with extensive support portfolios.

This assessment discusses the capabilities and strategic characteristics that explain success in this important but mature market. To be included in this assessment, support services providers must maintain servers, storage, or networking assets in a datacenter environment and have minimum support revenue of $500 million per year.

Datacenter Equipment Support

- **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 purchased by enterprise and service provider datacenters. This includes spending on network equipment such as routers, LAN switching, WLAN, optical, and storage networks.
- **Servers:** This 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:** These include disk storage systems, tape automation and tape libraries, and optical automation.
- **Storage networking infrastructure:** This category includes 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

Due 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). IDC recommends seeking a provider that matches the abilities you need from a technical perspective and complements your internal staff.

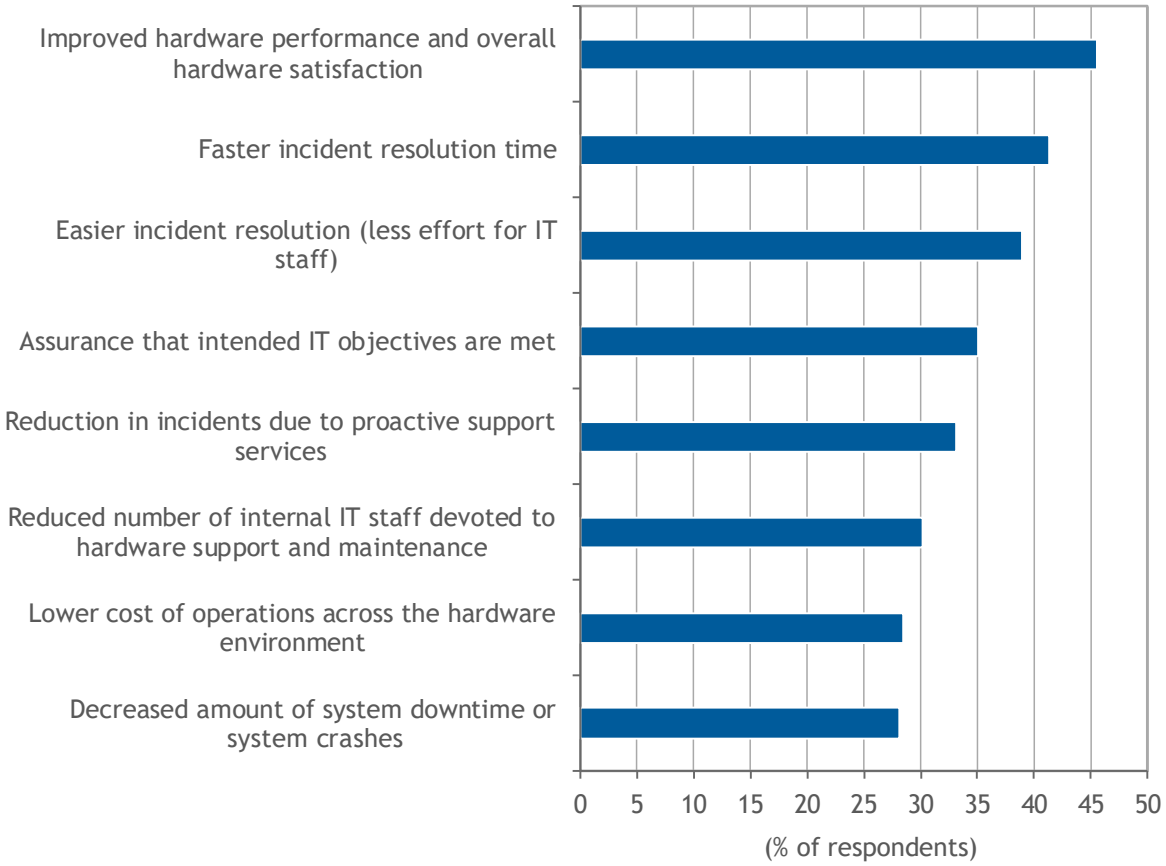
IDC's 2024 global survey of 1,112 enterprise customers (IDC's *Enterprise Support Services — Customer Satisfaction and Value Survey*) found that the top benefit sought from using

support services was to get more performance and value (i.e., a better experience) out of their purchased assets. Figure 2 shows the other responses (the other notable response was to increase time to resolution).

FIGURE 2

Top 3 Benefits from Support Services

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



n = 1,112

Source: IDC's *Enterprise Support Services — Customer Satisfaction and Value Survey*, December 2024

IDC recommends that organizations evaluate internal IT staff to look for skills gaps, then evaluate how vendor services can fill that gap. This is a key indicator that services do matter and marks one of the big differences between OEM and ODM providers (OEMs having a robust services portfolio). Key vendor customers specifically cited relationships, single points of contact, and technical account managers as critical when working with a particular provider. IDC recommends looking for vendors that invest in deepening relationships and not just selling systems.

Also topping the list of key enterprise needs:

- Technical expertise and effective communication to staff
- Support of the software-defined layer (hypervisors and OS)
- 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.

HPE

Hewlett Packard Enterprise (HPE) is positioned in the Leaders category in this 2025 IDC MarketScape on worldwide hardware support services.

Overall, IDC regards HPE Services as committed to its strategy to evolve into a service- and solutions-led company. This can be seen by the aggressive push of HPE GreenLake cloud, which includes HPE Complete Care Service. HPE has emphasized services to assist customers on their digital transformation (DX) and AI journeys. Over the past couple of years, the organization has streamlined and enhanced the support portfolio, everything from offering more in the base warranty to refreshing the portfolio with new offerings HPE Tech Care and HPE Complete Care (replacement to HPE Proactive Care (Advanced) and HPE Datacenter Care).

IDC's understanding is that HPE Services' strategy focuses on services that align with customer requirements for high-value services. HPE 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," which are strategic consulting-led services that accelerate DX and AI initiatives. The capabilities within this suite aim to bring together various stakeholders and align IT initiatives with business priorities. HPE Services also provides support/operational and

managed services across a wide range of multivendor hardware and software products.

Strengths

- Investments in technology and software platforms to become more proactive and predictive with managed support services and HPE GreenLake cloud
- Becoming a services-led organization in which 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 Complete Care Service with global consistency and abilities around the offers
- Enhancing existing offers with new abilities rather than creating new service offers

Challenges

- Keeping partners and customers educated on portfolio changes and how to extract the most benefit from them
- Need to continually train the existing workforce as well as its partner community on how to sell a service-led solution (especially HPE GreenLake cloud)
- Customers still leery of being "connected," hampering the ability of the vendor to be speedily reactive or proactive in their abilities to add real value
- Educating the customer and assisting them on how to get connected; the value creation from being connected needs to be addressed on an ongoing basis.

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 examine 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.

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 include 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 (a device that is no longer functioning)

- Poorly performing system or device (a device or technology environment that is not performing optimally)
- Potential problem (alerting a customer regarding a situation that could result in a down system)

Once the vendor has alerted the customer, the customer can 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

LEARN MORE

Related Research

- *Cisco CX's Strategic Approach to AI Across the Life Cycle* (IDC #US53646025, July 2025)
- *Pure//Accelerate 2025: Powering Intelligent Data for the AI Era* (IDC #US53643325, June 2025)
- *Market Analysis Perspective: Worldwide IT Service Strategies for Proactive Customer Success, 2024* (IDC #US52583424, September 2024)
- *IBM Hardware Support Customer Satisfaction Results: Management and Technical Abilities* (IDC #US52620522, September 2024)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of providers in the worldwide support services market. The IDC MarketScape is an evaluation based on a comprehensive framework and a set of parameters that assess providers relative to one another and to the 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 capable of delivering support services. This IDC MarketScape aims to differentiate those firms that are investing in innovation to meet customer 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." — Program Vice President Rob Brothers, 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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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