

## MARKET PERSPECTIVE

# Hitachi Vantara: Unleashing the Potential of a Data-Driven Enterprise

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## EXECUTIVE SNAPSHOT

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### FIGURE 1

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#### Executive Snapshot: Hitachi Vantara – Unleashing the Potential of a Data-Driven Enterprise

Hitachi Vantara's differentiation has a strong history of infrastructure leadership, delivering innovative infrastructure, data management, and industry products and services that enable businesses to extract more value and insights from their data. Hitachi's vision is that as businesses focus more on return on data-related investments, their need for reliable data infrastructure will increase, leading them to invest more with reputed vendors that deliver solutions for enterprise IT and industrial OT use cases.

#### Key Takeaways

- Hitachi Vantara leads with infrastructure and data management products and services at all levels.
- The company emphasizes the strategic importance of the digital infrastructure market for the firm's future. Hitachi Vantara reinforced its commitment to its diverse and loyal base of clients, many of whom are longtime users of its storage and compute products and services.
- Hitachi Vantara's big bets for the future center around simplifying infrastructure with software-defined capabilities, being data driven with more value from AI and cognitive solutions for customer value, and scaling solutions horizontally with differentiating vertically via an industry cloud strategy.

#### Recommended Actions

- Backup commitment to infrastructure by developing full-service compute and storage infrastructure solutions for the modern digital enterprise.
- Expand portfolio on industrial OT using M&A and partnerships and leveraging Hitachi Vantara's own services portfolio, a crown jewel in the company's business.
- Be aggressive in telling a sustainability story that discusses the way in which Hitachi Vantara's customers have benefitted from the efficiency of the company's storage infrastructure solutions.
- Lead with EverFlex to deliver modern hybrid cloud solutions to the market targeted at customers that are struggling with runaway IT costs.

Source: IDC, 2022

## NEW MARKET DEVELOPMENTS AND DYNAMICS

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### Introduction

Over two days in early November 2022, Hitachi Vantara hosted a group of analysts to provide details on product and strategy. The conference was hosted by the CEO and attended by senior executives from all business units as well as from several key customers. This IDC Market Perspective provides an overview of the key messages delivered by Hitachi Vantara executives at the event as well as IDC's point of view on the opportunities and challenges for Hitachi Vantara.

Hitachi Vantara led off the two-day analyst event with a session focused on Hitachi's solutions approach to a "data driven" enterprise. Hitachi Vantara's differentiation is in infrastructure and data management products. Its industry services leverage these products as the foundation to deliver innovative solutions that enable businesses to extract more value and insights from their data. Hitachi Vantara's vision is that as businesses focus more on return on data-related investments, their need for reliable data infrastructure will increase, leading them to invest more with vendors with a solid reputation in delivering storage infrastructure for enterprise IT and industrial IoT and operational technology (OT) use cases.

### Realignment of Strategic Priorities

At the event, Hitachi Vantara executives – and most notably their CEO, Gajen Kandiah – emphasized the strategic importance of the digital infrastructure market for the firm's future. They further reinforced the company's commitment to Hitachi's diverse and loyal base of clients, many of whom are longtime users of the company's storage and compute products and services. Kandiah discussed that the firm had impressive earnings YTD but that more could be done to double down on its differentiation in the industry.

To maintain its differentiation in the future, Hitachi Vantara continues to invest in reputed infrastructure solutions and services. Adding to this foundation, the company aims to simplify infrastructure with software-defined capabilities and enable data-driven initiatives through data operations (DataOps) and data fabric while bringing more value from AI and cognitive solutions. These horizontally applicable solutions will also be brought to specific verticals via an industry cloud strategy.

### Product Portfolio Analysis and Observations

IDC acknowledges that Hitachi Vantara's portfolio is quite solid, but could benefit from further expansion, specifically in areas of emerging and cloud-native workloads, dedicated cloud services, and hybrid cloud infrastructure. The sections that follow cover IDC's analysis and observations on Hitachi Vantara's product and services portfolio.

#### *Data Storage*

Hitachi Vantara's product portfolio is skewed heavily toward storage infrastructure, grouped under "Data Storage." The company does have a portfolio of computing platforms (branded as Hitachi Unified Compute Platform) but does not place much emphasis on them as a standalone product category. Instead, the firm has chosen to group them under "Converged and Hyperconverged Infrastructure," which is itself nested under Data Storage, indicating the selling motion is largely solutions based.

Hitachi Vantara's Data Storage portfolio – if we include computing platforms and storage infrastructure software – is quite comprehensive. Aside from the company's block storage system and computing platforms, much of the company's portfolio is made up of products acquired via M&A. This has given the firm an engineering presence outside of Japan. Further, the company has done a reasonably good job of integrating these products under the Hitachi Vantara brand. Its block, file, and object storage solutions have gained reputation in the industry for being solid, highly resilient, and scalable.

Hitachi Vantara has made early progress to move its value chain further up the stack. Its products offer customers the ability to extract value from data in the form of decision support in the areas of cost reductions, synergies, and/or new revenue opportunities. This delivers what Hitachi is referring to as a "return on data" by deriving cost savings or revenue increases from insights gained from analytics on a customer's data. This improvement in the "return on data" increases the value of Hitachi's hardware, software, and services portfolio to customers or partners. In turn, these high-value solutions increase the demand for storage media and hardware, a trend that is only expected to grow over the long term.

The consumption patterns for data storage are changing dramatically with the advent of public cloud services. Storage is shifting from being consumed exclusively on premises to being consumed in a hybrid manner, including in and via public and dedicated cloud environments. IT buyers are increasingly demanding operationally friendly, flexible consumption services when procuring newer on-premises storage. Although Hitachi Vantara's product portfolio is largely on premises based, the firm is rapidly embracing storage as a service via its EverFlex brand. The "as a service" portion of enterprise storage and compute market is relatively small today but is expected to grow more rapidly than other areas of storage such as private on-premises datacenters or even the public cloud. EverFlex competes with solutions such as HPE GreenLake, Dell APEX, Lenovo TruScale, Pure Storage Evergreen, and NetApp Keystone, to name a few. Hitachi Vantara's plans for EverFlex are still not clear, though the company does seem keen on making investments here.

Customers becoming disenchanted with rising cloud costs, such as high egress costs, are looking to take certain workloads back to private datacenters. Solutions such as Hitachi Vantara's EverFlex are certainly one way to do that while still maintaining the scalable, elastic, and metering features of a cloud offering with an opex expense profile that works well in today's uncertain macroeconomic environment. Near-term macroeconomic weakness is driving reductions in capex in many industries today and as revenue is expected to decline, capex reductions are becoming the norm over the near term as companies attempt to maintain capex at a target percentage of revenue. This on the margin is helping shift business to public and private cloud offerings that offer the elastic scaling and metering opex instead of capex cost models.

Hitachi Vantara also plans to improve its competitive position by focusing on the nexus of OT and IT, improving the "return on data," and differentiating itself by integrating its software, consulting, and IT hardware offerings to provide a compelling value proposition in storage and compute.

## **Lumada**

Hitachi Vantara's Lumada portfolio offers a range of capabilities at the application level of leveraging data: data integration, data catalog, intelligence, and analytics. Lumada supports development and deployment of data pipelines in the traditional IT domain with DataOps and in the OT and IoT domain with industrial DataOps and can provide a bridge between through data and metadata integration for delivery of end-to-end pipelines that can cross the OT-IT chasm. The Lumada Data Catalog, part of its Lumada DataOps portfolio, provides the intelligence required to ensure that the data is trustworthy and governed and maintained at the highest quality, hence ensuring that the data in the pipeline is the right

data for processing in the right context and that it is being leveraged appropriately by understanding where private and sensitive information exists. A new product being introduced into the Lumada platform is centered around the "Elastic Data Plane" architecture. At its core, the Elastic Data Plane leverages Apache Arrow to provide consistent access to disparate and diverse data sources while also enabling pushdown data processing capabilities. Hitachi Vantara is now creating a connection between the data plane and the storage plane. Intelligence in the catalog such as sovereignty and privacy requirements can be used in data orchestration and protection operations. This ensures that the data is not only being leveraged appropriately but also that it is being stored and managed properly at the infrastructure layer.

According to IDC's August 2022 *Future Enterprise Global Survey*, 25-50% of organizations worldwide have adopted a digital-first strategy and stated the top challenge in running a digital business is "building a data-driven business and culture." This speaks to the need for modern data management technologies in the digital business era. Survey respondents also indicated that the most critical lever to running a digital business in the next 12 months is "using data and intelligence strategically to create competitive differentiation."

Hitachi Vantara noted that the word "Lumada" means "Illuminating Data." Illuminating data is critical in helping organizations build a data-driven business and culture in their attempt to create competitive differentiation. Lumada is a strategic platform for Hitachi Vantara, noting during the event that growth levers exist in the data leverage layer, more specifically DataOps, industrial DataOps, IIoT Core software, data integration and intelligence, and analytics. This is where data value is realized in the delivery of data and analytics into operational and analytical use cases to drive better decisions and business outcomes.

The connection that Hitachi Vantara is making between the data plane and the storage is natural and needed. If data storage isn't efficient, data integration and analytics processing will suffer. Inversely, data intelligence gathered in the data plane can be leveraged to optimize storage decisions and locations to ensure compliance with internal and external policies. Hitachi Vantara is one of the few vendors that can make this connection natively, and it is one of the first to make it happen. In combination with new capabilities of the Elastic Data Plane, Hitachi Vantara has an opportunity to differentiate itself among data integration, intelligence, analytics, and storage companies in the market.

## Services Portfolio Analysis and Observations

Hitachi Vantara's services portfolio, like the company's product portfolio, is quite comprehensive. The firm has worked closely with its product teams to complement services centered around infrastructure, engineering, IIoT, and IT/OT integration.

### *Hitachi Life-Cycle Services*

Hitachi offers a full suite of life-cycle services across its application, infrastructure, and data modernization offers, as well as services for storage and industrial solutions. Services include consulting and advisory, implementation and integration, support, and managed services. Offerings are underpinned by significant investments in telemetry for predictive and preventative maintenance and are integrated with product engineering teams for continuous product development and enhancement. Furthermore, the telemetry and insights gleaned from the systems and devices feed into Hitachi's remote operations as well as Clear Sight, a SaaS-based tool for storage fleet management and observability. Hitachi's remote operations as well as access to the telemetry are available to customers as well as partners to improve operations and visibility across their

infrastructure and applications. The Hitachi services portfolio is designed to help customers effectively design and deploy hybrid cloud infrastructures, enterprise applications, and IIoT/IT/OT solutions more successfully while architecting them to extract data more intelligently to drive business initiatives.

Hitachi Vantara is an engineering and R&D-driven culture with a keen focus on investing in and developing tools and platforms for de-risked migrations, smoother integrations, faster problem resolution, and improved and actionable insights. While smartly engineered, many of these investments appear to be duplicative across the many services organizations across Hitachi Vantara, with resources residing in Lumada (data operations), Consulting and Integration (applications), Support (storage products), Digital Services (IT/OT solutions), and Managed Services. IDC suggests that these resources come under one organization, making it easier for sellers, partners, and customers to navigate the portfolio and its resources. The conjoined portfolio will be stronger, more differentiated, and competitive while providing more value to its customers and partners than having disparate resources spread across the organization.

### **Digital Engineering Services**

Hitachi Vantara's digital engineering services strategy is focused on helping the company's customers modernize their business and operations at scale. The company achieves this aspiration by designing experiences, engineering digital products, and managing operations for its customers, with a focus on delivering frictionless experiences and innovation. Its core mantra is "to scale horizontally and differentiate vertically."

Hitachi Group recently acquired GlobalLogic, a software engineering services provider (see *Hitachi Acquires GlobalLogic and Makes a Big Push into Digital Engineering and Operational Technology Services*, IDC #IcUS47649121, April 2021). Historically, Hitachi Vantara's strengths have centered around operational technology and IT, but this acquisition provided Hitachi Vantara the ability to extend its services offering starting with design/engineering experiences, building new software products/platforms, and leveraging its data and cloud infrastructure and services capabilities to manage operations and provide insights to customers. In addition, it leverages its internal R&D engine that builds new solutions based on customer needs. These solutions included a full stack operations solution that included IT, OT, and product solution capabilities and a transportation repair/diagnostic solution leveraging vision, AI, and other technologies.

After years of experimenting, Hitachi Vantara appears to be heading down the right path in establishing its presence in the digital engineering services market. It is focused on a specific engineering services niche coupled with high-impact, AI-enabled, and data-driven managed engineering services. It has been a little over a year since Hitachi acquired GlobalLogic, and IDC got a glimpse into how both Hitachi Vantara and GlobalLogic are collaborating. The OT, specific engineering services and software engineering services, is all growing at a good rate. IDC recommends that Hitachi should accelerate the collaboration of these two companies to create a strong player in the digital engineering services market.

### **Channels and Alliances**

Hitachi Vantara is a channel-friendly organization, having recommitted to its partner strategy four years ago when it brought in new channel and alliances leadership with a keen focus on execution, simplified programs, and offers. The channel organization trimmed down to one core contract from 15 that expands across the four different business models of its partner community including global systems integrators (GSIs), value-added resellers (VARs), managed service providers (SPs), and distributors. It

developed learning and certification programs to improve partner competencies in datacenter products, IoT solutions, and analytics and has grown to 75,000 modules taken by partners. It improved its quoting system, gained 274 new partners in 2022, and increased channel revenue by 15% year over year. According to the company, it has been ranked as its partners most profitable vendor by delivering value and performance.

Hitachi Vantara has seen success with its channel partners and is beginning to apply that discipline to expanding its strategic alliances. Over time, the company has also edited and refined its alliance program by targeting alliances that are additive to all parties. Hitachi Vantara now has strong co-innovative alliances with Cisco and VMware, which were highlighted at the event. Hitachi Vantara would do well to leverage the marketing muscle of some of its larger partners that may have stronger brand recognition and larger marketing budgets to drive awareness of their joint solutions. Hitachi Vantara, while partner of the larger Hitachi organization, is still relatively unknown, and leveraging its channel and its alliance ecosystem is a smart way to expand influence and awareness.

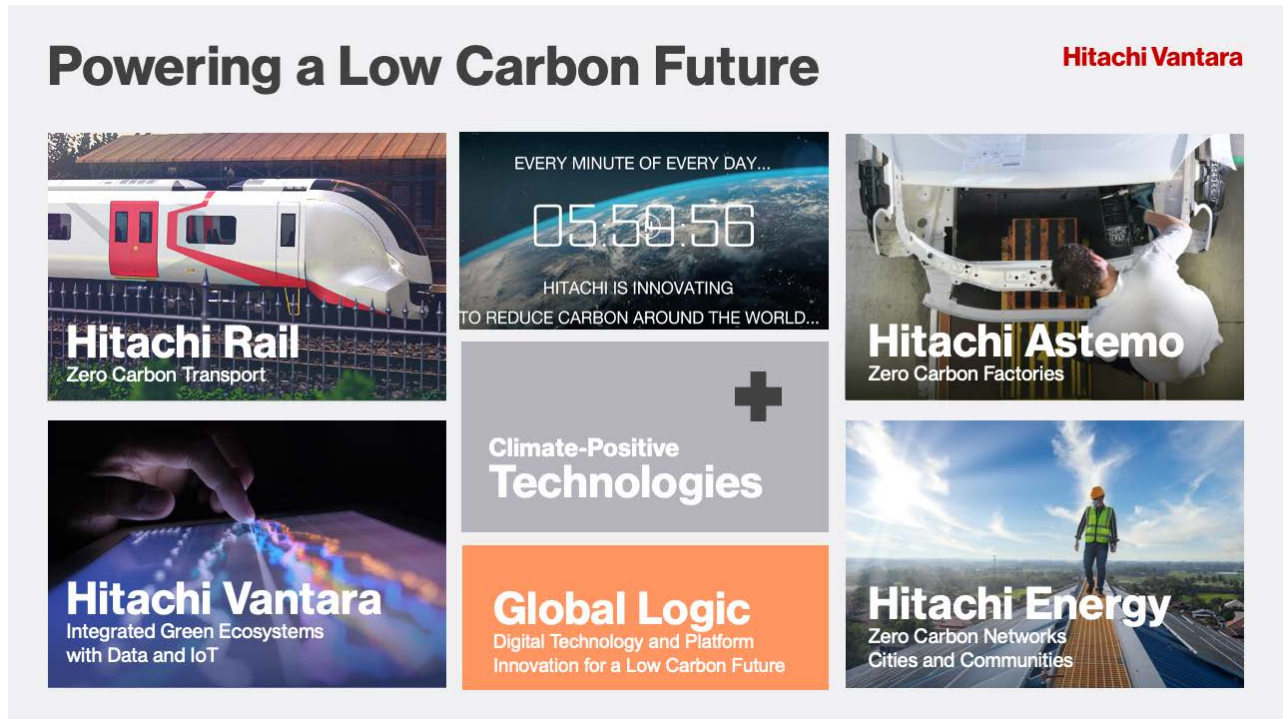
## **Sustainability in Global Business Operations and Transformation**

Hitachi Vantara is taking an aggressive approach to sustainability by extending its companywide mantra of "Powering Good" to its sustainability initiative. The company is responding to customers that want to know their position on CO<sub>2</sub> emissions in their facilities and overall operations and KPIs around sustainability; this is clearly a factor in procurements and RFPs.

Hitachi Vantara took a lot of time to demonstrate its commitment to sustainability and ESG (environment, social, and governance) issues overall with a strategy for green transformation for the core, which focuses on the decarbonization of its internal operations with targets for emissions. This includes a 50% reduction in carbon emissions by 2030 and a carbon-free supply chain by 2050. True to its roots, Hitachi Vantara is looking at these efforts via its work with customers in energy, transportation, and digital engineering and collaborating across business units – Hitachi Energy, Hitachi Rail, Hitachi Astemo, Hitachi Vantara, GlobalLogic, Hitachi ZeroCarbon fleets, and Hitachi Ventures (see Figure 2).

FIGURE 2

## Hitachi Assets Working to Power a Low-Carbon Future



Source: Hitachi Vantara, 2022

Beyond its internal operations, Hitachi Vantara is focused on supporting clients to power zero carbon efforts in:

- The Circular Economy
- Smart Cities
- Smart buildings
- Mobility as a service
- Zero carbon fleets
- Electric and battery trains/rail

Hitachi Vantara provided several interesting examples of its ongoing work in sustainability and carbon reduction:

- **The Optimise Prime pilot in London:** Hitachi Vantara is working with the Royal Mail, Uber, and other companies in London to connect a large number of electric vehicles (EVs) to the grid to determine how large fleets can transition to EVs and to track the impact on the city. Using three different types of fleets, Hitachi Vantara is working with companies in London to understand how EVs will affect the electrical grid, road infrastructure, EV charging infrastructure, and so forth.

- **Energy-neutral distribution center:** The first carbon-neutral distribution center is a facility with state-of-the-art design for reducing carbon in operations and is the largest unsubsidized solar project in a single building in Europe, with 6,120 solar roof panels and no use of natural gas. The entire design is to reduce natural resources consumption for concrete building materials, has a geothermic system for better energy efficiency, uses rainwater for flushing toilets, uses solar panels for energy, and even has an herb garden.

It's clear that Hitachi Vantara is using its OT experience in industrial engineering and transportation as well as its IT expertise in data analytics, ML, and AI to improve its own operations as well as those of its customers. The company has many examples in urban and city transportation and "connective industries." These examples need to be highlighted for cities around the world; right now, they are grouped under "transportation" and need to be cross-referenced with Smart Cities as this is a major investment area for subnational governments around the world. Hitachi Vantara needs to market its work at COP26 and its work for carbon-reduced products as well as its ability to satisfy requirements for green procurement.

## Industry-Focused Solutions

Hitachi Vantara's vision is to deliver IIoT outcomes that bring together operational technologies in cities and industry with IT in cloud, storage infrastructure, analytics, and applications for "social innovation." For industry solutions, the company's go-to-market strategy is industry cloud and delivering on industry-specific outcomes. Hitachi's industry cloud has a seven-layer architecture, in which layers 5, 6, and 7 are configured by industry for specific use cases and industry operations. That said, Hitachi Vantara believes the hybrid cloud and the coexistence of on-premises and cloud solutions will drive how it helps customers manage the data and infrastructure from edge to datacenter to cloud across hybrid storage systems.

Hitachi Vantara provided several strong customer examples of its work, highlighting the reliability of the products as well as ability to cocreate solutions.

Despite Hitachi Vantara's expertise in industrial IoT and OT, the message around industry-specific outcomes is less clear that mitigates the company's stated strategy of outcomes, not products. Those in IT and operations, across all industries, want to hear more about outcomes and processes in conjunction with engineering and product excellence. The GTM strategy around industry cloud jibes less well with other messaging around being "data driven." Hitachi Vantara should lead with its customer examples and testimonials and develop specific messaging around outcomes it can deliver for its targeted industry customers; at this point, it seems the discussion is still centered and led by product and business unit capabilities.

## ADVICE FOR HITACHI VANTARA

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Over the past few years, Hitachi Vantara has made a conscious effort to capitalize on key dynamics shaping the IT market. It foresaw that a pure-play storage infrastructure vendor had to move its value proposition up the stack, expanding into data-driven intelligence. To that end, it underwent a rebranding initiative moving away from the old name "Hitachi Data Systems." IDC believes that unlike other IT vendors that have pursued a similar strategy, Hitachi Vantara does not get due credit for its efforts. This could be in part because the company does not spend as much on sales and marketing initiatives like many of its competitors.



In Hitachi Vantara's defense, over the past few years, the vendor has made strategic acquisitions that have enabled it to expand its portfolio of products and services. As a result, it has steadily expanded its infrastructure and services client base. Hitachi Vantara boasts of a loyal client base that swears by the rock-solid performance delivered by its infrastructure solutions. Herein lies Hitachi Vantara's conundrum – as much as the company wants to be perceived as a full-service IT vendor, much of its revenue comes from its infrastructure solutions and storage infrastructure solutions, to be more specific.

During the event, the Hitachi Vantara CEO and his executive team reinforced their commitment to infrastructure and to their loyal client base. This is of paramount importance, as the company risks eroding its client base as it embraces hybrid cloud solutions from its competitors or worse still go all in on the public cloud. It is not too late for the company to change the tide in its favor.

For Hitachi Vantara to truly gain the stature of a full-service IT vendor, it must take a well-balanced approach to delivering infrastructure solutions. Today, when the vendor refers to infrastructure, it largely refers to data storage. Its computing platforms are embedded under converged and hyperconverged infrastructure, and its software-defined storage offerings must be supported across multitude of third-party hardware platforms and cloud services. This gives the perception that despite all the rebranding initiatives, the company remains a pure-play storage vendor under the covers. IDC recommends that Hitachi promote its computing platforms and converged and hyperconverged products to be standalone and out from under the shadows of "Data Storage."

Similarly, Hitachi Vantara's expansion into industrial OT is commendable but at the same time feels incomplete. The firm must aggressively expand its solutions via M&A and strategic partnerships that lead to an expansive ecosystem. Hitachi Vantara has a unique services business, which can serve as the beachhead for industrial OT engagements. Like its storage business, Hitachi Vantara must seek to make this business sticky.

Hitachi Vantara has a compelling sustainability story, but that story gets quickly diluted when it is attached to the greater Hitachi Global narrative. Hitachi Vantara's own sustainability story must focus on data infrastructure and how the company's customers benefit from the efficiency of Hitachi's storage solutions (which has gone up exponentially in the past few years).

Hitachi must tie its own data infrastructure solutions with its flexible consumption offerings (EverFlex) to deliver hybrid cloud solutions for modern enterprise. Here, Hitachi Vantara can tell a compelling narrative that ties together sustainability and the breadth of its infrastructure with the growing demand for IT-as-a-service consumption models.

Finally, technology buyers may not have heard of Hitachi Vantara as often or actively as other IT vendors that are more aggressive with their marketing. Hitachi Vantara should rely more on its partners to change the lack of awareness in the market. For example, Hitachi Vantara can showcase its work on migration services with cloud SPs globally to grow this area beyond services for ERP consulting. With a large and complex portfolio, Hitachi Vantara needs to refine its industry-specific messaging for products, software, and services and to deliver a simpler, more cohesive story.

## IDC'S POINT OF VIEW

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The connection that Hitachi Vantara is making between the data plane and the storage is natural and needed. If data storage is not efficiently implemented and/or managed, data integration and analytics

processing will suffer. Conversely, data intelligence gathered in the data plane can be leveraged to optimize storage decisions and locations to ensure compliance with internal and external policies. Hitachi Vantara is one of the few vendors that can make this connection natively, and it is one of the first to make it happen. In combination with new capabilities of the Elastic Data Plane, Hitachi Vantara has an opportunity to differentiate itself among data integration, intelligence, analytics, and storage companies in the market.

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## LEARN MORE

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### Related Research

- *IDC FutureScape: Worldwide Smart Cities and Communities 2023 Predictions* (IDC #US48646322, November 2022)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2022: Smart Cities and Communities* (IDC #US48645922, September 2022)
- *IDC Industry CloudPath Survey Analysis: State and Local Government, 2022* (IDC #US49688822, September 2022)
- *Digital Engineering and Operational Technology Services Case Studies - Part 3* (IDC #US48533622, September 2022)
- *Worldwide Enterprise Storage Systems Market Overview, 2Q22* (IDC #US49715522, September 2022)
- *Market Analysis Perspective: Worldwide Storage Systems, 2022* (IDC #US49684022, September 2022)
- *Market Analysis Perspective: Worldwide Digital Engineering and OT Services, 2022* (IDC #US49670622, September 2022)

## Synopsis

This IDC Market Perspective provides an overview of the key messages delivered by Hitachi Vantara executives at the event as well as IDC's point of view on the opportunities and challenges for Hitachi Vantara.

Hitachi Vantara offers innovative solutions for modern enterprise. They include data and compute infrastructure solutions for hybrid cloud environments, industrial IT solutions for converged IT/OT environments, and services that deliver unprecedented value to customers that are undergoing change. "With strategic investments and portfolio realignment to its vision, Hitachi Vantara will quickly gain the recognition it deserves," said Ruthbea Yesner, research vice president, IDC Government Insights, Education, Smart Cities, and Communities.

## 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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