

IDC MarketScape

IDC MarketScape: Europe Electronic Healthcare Record 2023-2024 Vendor Assessment

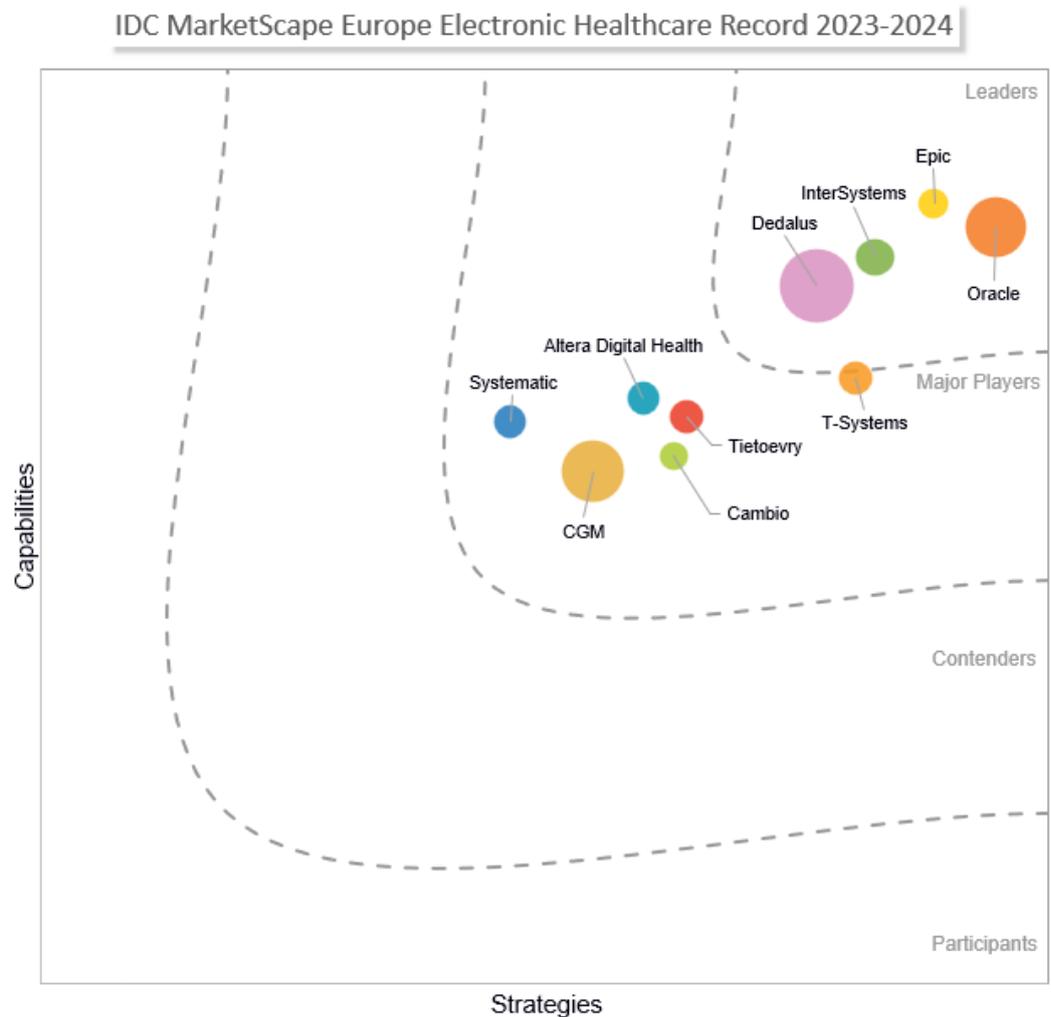
Adriana Allocato Silvia Piai

THIS IDC MARKETSCAPE EXCERPT FEATURES INTERSYSTEMS

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Europe Electronic Healthcare Record, 2023-2024



Source: IDC, 2023

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

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Europe Electronic Healthcare Record 2023-2024 Vendor Assessment (Doc # EUR150048423). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Electronic healthcare records (EHRs) are at a pivotal moment in their evolution, transitioning from digital repositories of patient information to dynamic and integrated platforms that drive the broader transformation of healthcare systems. The move toward patient-centric care and the rapid advancement of digital solutions have been reshaping the EHR market. Modern EHRs aim to offer a secure, comprehensive patient view, made more open and shareable through the wider adoption of interoperability standards such as Fast Healthcare Interoperability Resources (FHIR) and API-based architectures, fostering integrated and connected care ecosystems. Next-generation EHR solutions are therefore designed to adapt to evolving healthcare needs and technological advancements, ensuring organizations can grow and innovate over time.

Fast-paced changes during the pandemic and the prevailing economic uncertainty have compelled European healthcare organizations to thoroughly reassess and redefine their strategies, accelerating the shift toward a data-driven approach to address critical challenges such as the clinical workforce crisis and long waiting lists as well as to prioritize the improvement of health outcomes and operational efficiency. By leveraging cloud and advanced data analytics, next-generation EHRs play a central role in data-driven strategies. Cloud-based EHR solutions help healthcare organizations to streamline data management. Cloud technology provides a scalable and centralized platform for storing, processing, and retrieving vast amounts of data. Cloud facilitates seamless data sharing, real-time updates, and access to advanced intelligence-driven features that soon will also include generative AI (GenAI) capabilities. This enhances flexibility and functionality, empowering healthcare organizations to fully leverage their data resources. According to the *2023 IDC CEO Survey*, 28% of healthcare organizations prioritize IT spending on data and analytics systems. Research also indicates strategic investments in EHR solutions that integrate advanced analytics and artificial intelligence (AI), natural language processing (NLP), and ambient intelligence. This integration empowers EHR systems to serve as platforms for generating insights, automating processes, and enhancing engagement and experiences for clinical workforces and patients. Nonetheless, the adoption of advanced EHR solutions may encounter limitations stemming from legacy infrastructures, as well as privacy concerns, driven by stringent data protection regulations and the ever-present risk of cybersecurity attacks. Safeguarding patient information is becoming even-more complex with the advent of GenAI. Healthcare providers are trying to develop guidelines for the use of GenAI in next-generation EHRs to ensure the safety, effectiveness, and ethical application of these technologies.

To tackle these challenges and align with different requirements, EHR vendors are focusing on enhanced usability, data interoperability, standardization, and modularity, providing healthcare customers with tools and services for configuring EHRs solutions to their specific needs. This ensures coherence and prevents unsustainable customizations that may result in data and operational silos over time. They are also responding to specific requirements by expanding their partner ecosystems, enabling them to cater to different use cases, deployment models, and compliance needs. These approaches are meant to facilitate the seamless implementation of EHR solutions. Evaluating the effectiveness and long-term success of EHR implementations is crucial for healthcare organizations. Healthcare organizations need to count on a comprehensive integrated platform of engagement and intelligence that goes far beyond the traditional clinical

documentation storage to embed new functionalities such as the digital access to patient records as well as support value-added activities such as patient engagement and integrated care pathways. For successful EHR implementation, addressing challenges in user interface (UI), user experience (UX), and human-machine interaction is essential, blending modern system design with cutting-edge technology. To assess success in their EHR projects, healthcare providers should consider the benefits in terms of the following key areas:

- **Improved efficiency and workflow optimization for clinical and operational processes.** EHR systems can improve efficiency through secure centralized access to patient data, enabling seamless sharing and coordination among clinicians. They can also facilitate faster analysis for actionable insights, enhancing decision making and compressing timeframes. Advanced data collection from other clinical systems and medical devices as well as automation support the streamlining of administrative tasks. This provides clinicians with more patient interaction time and reduce care delivery costs. Integration with enterprise systems such as enterprise resource planning (ERP) and human resource management (HRM) enables intelligent optimization of resources (beds, staff, equipment, etc.), enhancing healthcare organizations' efficiency and resilience to change.
- **Empowered workforce experience.** Dependable EHR systems with swift response times alleviate the burden on overworked clinical staff. Automation of tasks such as appointment scheduling, resource allocation, and clinical documentation – facilitated by AI technologies including NLP, ambient intelligence, and more recently, GenAI – reduces paperwork and lightens the workload for clinicians. EHRs alleviate information overload and decision fatigue for clinicians by granting timely access to diagnostic results and patient histories. Through AI-driven extraction of valuable insights from structured and unstructured clinical documents, along with the integration of evidence-based recommendations, EHRs enhance clinical decision making.
- **Enhanced patient care and safety.** EHR systems enable healthcare professionals to store, track accurately, and share clinical information, developing longitudinal and comprehensive views of patients. EHRs improve the precision and clarity of medical records, offering alerts and reminders for best practices and medication management protocols throughout the patient journey, ultimately contributing to the reduction of medical errors. Access to patient information empowers healthcare professionals to identify early risks, monitor disease progression, make well-informed decisions promptly, and implement effective preventive care and disease management strategies. This leads to less invasive treatments and fosters a cohesive care delivery model that positively impacts care safety and patient outcomes.
- **Elevated patient engagement through personalized digital interactions.** To maximize patient value, healthcare providers aim to leverage their EHRs for establishing deeper connections through rich, personalized digital interaction capabilities. These interactions offer comprehensive and effective information, encouraging active patient engagement in their well-being and participation in the care process. Healthcare providers are exploring the potential of utilizing AI capabilities to facilitate the transition toward patient-centric EHRs that enhance accessibility to care and work toward reducing inequalities. AI is becoming more integrated into patient-facing services such as registration, scheduling, patient communications, and messaging. Healthcare providers are also interested in applying AI in virtual care solutions and intelligent patient assistants. These systems are anticipated not only to streamline patient interactions, but also to foster empathy. For instance, they may offer patient portals available in multiple languages or provide live translation services. Additionally, they support patients in prevention and well-being by utilizing algorithms to personalize and coordinate care teams and patient pathways, aiding in the planning of a course of action.

Supportive initiatives launched by national governments are also contributing to the EHR market growth in Europe. In the U.K., the latest NHS mandate prioritizes EHR targets and requires 90% of NHS trusts and foundation trusts to have EHR systems by December 2023 and 95% by March 2025. In France, the National eHealth Agency has initiated the second phase of "Séjour du numérique en santé," a program that focuses on enhancing healthcare information management, improving accessibility, and modernizing clinical information systems, including EHRs.

These initiatives aim to empower healthcare providers to harness health data for increased operational efficiency and drive the evolution toward integrated care models, incorporating virtual and home-based settings as key service delivery environments in the patient journey.

As a result of these initiatives and broader market dynamics, European healthcare organizations are redefining their EHR strategies, seeking solutions that empower their workforce for increased collaboration and productivity while also addressing the need for preventing burnout and fostering more empathetic and insightful connections. They are also looking for solutions that aid in orchestrating resources to achieve financial viability, while ensuring they meet the health needs of the populations they serve, striving for equitable outcomes. These requirements call for reliable, secure, and scalable EHR solutions, designed with an architecture that prioritizes technical, semantic, and process interoperability. This design is crucial for enriching the EHR with a diverse range of capabilities. Nevertheless, it also demands a fresh approach to services and support from EHR vendors to effectively design, configure, implement, and operate EHR capabilities, ultimately enhancing patient value.

This IDC MarketScape provides European healthcare organizations insights into the current capabilities and future strategies of EHR solution vendors. It serves as a guide for their projects as they plan for comprehensive EHR solution deployments. The main findings suggest that:

- **A modern data platform approach is critical to deploy a successful EHR solution.** As modern IT infrastructure is the foundation for a data-driven environment, EHR vendors have been prioritizing the modernization of their solutions architectures. They have also formed extensive partnerships with global data platform providers to enhance their API management, support large-scale data integration, and exchange capabilities. This unlocks the potential benefits of data sharing while concurrently helping to address emerging security and compliance concerns.
- **EHR vendors are increasing their efforts to include sovereign cloud capabilities.** Healthcare organizations are increasingly considering investments in sovereign cloud deployments to comply with growing complex regulations and more stringent data privacy and residency requirements. EHR vendors are addressing security concerns around patient data privacy and access controls. They provide the option to deploy their solutions in sovereign environments either with their own capabilities or through partners. Additionally, they are enhancing their cybersecurity measures with multiple layers of protection. This is adding major value to their solutions, helping healthcare providers comply with EU and national digital sovereignty and secure data space strategies and policies.
- **Advanced data analytics and AI capabilities to augment clinical decision making and streamline workflow are now essential for EHR solutions.** Healthcare organizations are increasingly eager to harness analytics, AI, and ML to optimize processes, automate clinical workflows, and achieve safer and more personalized care and greater operational efficiency. To help them to take advantage of the large amount of data collected and stored into EHR systems, vendors are consistently integrating data analytics and AI into their core offerings and strategically allocating resources to further enhance these capabilities.

- **EHR systems are evolving to reduce the workforce burden and improve clinicians' experience.** The usability of EHR systems for healthcare staff has always been a crucial issue, impeding the widespread adoption and realization of EHR benefits throughout the enterprise. Vendors are committed to creating better experiences for clinicians by implementing user-friendly interfaces, ambient intelligence, and different input technologies to enable users to interact with EHRs in the most convenient way. This, along with the integration of decision-making tools and personalized dashboard, are making the EHR an essential component of the strategy to improve job satisfaction for clinicians. For example, vendors are investing in streamlining workflows, utilizing advanced speech recognition software and digital scribes to automate administrative tasks, ultimately reducing the time spent on document processing and lowering clinical burnout.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

While firms must have established reputations working in the European healthcare industry, IDC has defined a set of inclusion criteria to ensure this IDC MarketScape is fair to all vendors that actively play in this market:

- **Geography.** The vendor has an established corporate presence (e.g., main/branch office) in Europe that manages (or supports) the sales, delivery, and/or implementation of health IT solution/s.
- **Market.** The vendor sells EHR solution/s in at least two different European health IT markets.
- **Vertical.** The vendor delivers EHR solution/s to healthcare providers.
- **Revenue.** A minimum revenue threshold is not mandatory. However, the vendor should have above \$40 million of estimated revenue in the European healthcare market for calendar years 2021 and 2022. Revenue must come from EHR solutions and related IT services.
- **Offering.** The vendor offers EHR solutions and services. IDC defines an EHR as "applications and platforms that enable digital versions of patient charts and allow clinicians to securely access real-time information to perform documentation, record-keeping, and decision-making functions at the point of care; and for staff members to use for day-to-day administrative, legal, financial, and operational functions."

ADVICE FOR TECHNOLOGY BUYERS

The European EHR market offers a range of challenges and opportunities for technology buyers aiming to advance their healthcare organizations. Regional health systems, hospitals, and other healthcare provider facilities in Europe are trying to rapidly transition toward digital-first worlds to future proof their organizations.

This IDC MarketScape supports healthcare providers in evaluating EHR solutions and go-to-market strategies of IT vendors that serve healthcare organizations in Europe. It analyzes vendors addressing healthcare-specific needs and requirements and outlines the criteria by which they were evaluated. Each organization should assess its individual requirements, taking into account factors such as technological readiness, capabilities, care service delivery settings, and conditions. This IDC MarketScape can serve as a valuable guide to help organizations make informed decisions in choosing the most suitable solution provider.

IDC recommends that healthcare organizations to consider the following:

- **Establish a robust and comprehensive EHR architecture and infrastructure.** To effectively implement EHR systems and maximize their strategic value, it is crucial to establish robust and comprehensive underlying IT infrastructure and architecture strategies. Providers should focus on creating modern hybrid environments that can efficiently scale data platforms and intelligence capabilities. Agile architectures are essential for seamless integration of diverse data sources, given the complex nature of healthcare data integration. Recognizing that data plays a pivotal role in enhancing quality care and operational efficiency, healthcare organizations should consider partnering with vendors able to support and enable this platform strategy
- **Consider the EHR system investment within a broader enterprise data platform strategy to increase efficiency and patient value as well as to support new care models.** The rapid acceleration of digital healthcare solutions has prompted EHR vendors to enhance their core applications by incorporating additional complementary capabilities. For example, this includes providing access to digital apps from within the EHR workflow and creating more integration points with other key enterprise solutions as HRM, ERP, supply chain, and logistic systems, fostering a cohesive IT system. The result is a unified platform that streamlines administrative and clinical workflows, supported by a modern system architecture. This, in turn, enable the provision of accurate and comprehensive patient records, secure data exchange, as well as greater coordination of clinical and operational processes.
- **Involve healthcare professionals to determine the most valuable aspects for them.** Gathering direct input from clinicians and healthcare professionals regarding the EHR features they value most is essential. This input will support the prioritization of what should be addressed first in an EHR system investment. Start with surveys and focus groups, then proceed to quick pilots to validate findings and determine which functionalities should be scaled up to production. It is also crucial to provide training and ongoing support for clinicians to learn to use valuable EHR functionalities that are tailored to their specific workflows and processes. This approach is strategic not only to enhance EHR utilization levels and workflows efficiency, but also to contribute to a more positive workforce experience.
- **Address regulatory and security concerns.** When selecting an EHR system, it is crucial to prioritize cybersecurity and regulatory compliance. EHR systems need to be compliant with European data privacy, data residency, and security regulation and frameworks. Vendors should be evaluated based on their ability to provide robust security measures and their capability to fit within the broader cybersecurity strategy of the organization. In addition, they should be able to demonstrate compliance with regulatory frameworks through certifications and audits.
- **Forge strategic partnerships.** In the dynamic evolution of the European healthcare ecosystem, ensuring success in EHR projects requires partnering with vendors open to strategic alliances and have the capability to seamlessly integrate their solutions into the intricate fabric of the national healthcare system.
- **Assess market trends and vendor long-term strategies.** Staying abreast of the latest market trends is crucial when selecting an EHR vendor. Referencing industry surveys and reports is one way to achieve this. Additionally, it is vital to evaluate vendors based on their commitment to research and development, customer-centric innovation, and strategic incorporation of next-generation EHR features. This approach ensures technology buyers select vendors committed to staying at the forefront of innovation and providing cutting-edge technology solutions.

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 opportunities.

InterSystems

InterSystems is positioned in the Leaders category in this IDC MarketScape for Europe Electronic Healthcare Record 2023-2024.

Founded in 1978 and headquartered in Cambridge, Massachusetts (U.S.), InterSystems is a global provider of software and technology for data management and integration for different industries including healthcare, financial services, governments, manufacturing, and logistics. Healthcare is a key sector for the company, with the company offering focusing on technologies for developing healthcare solutions and its own healthcare solutions including:

- InterSystems IRIS for Health, a comprehensive data management platform for healthcare with advanced interoperability and analytics capabilities on which InterSystems and its partners can build and integrate their products and software applications.
- HealthShare, an interoperability product suite to integrate and share patient data across multiple organizations, specialty departments, and siloed applications.
- TrakCare EHR, a unified, flexible, and web-based healthcare information system developed on InterSystems IRIS for Health data platform, which ensures the support of the most recent standards for interoperability and security, such as HL7 FHIR and HL7 V2.

TrakCare is a comprehensive, browser-based health information system that can be scaled out on demand to connect care teams across facilities and organizations through a unified database of patient records. It's deployed in 28 countries in Europe, Asia/Pacific, and Latin America with a small but growing presence in southern Africa. Depending on the region, approximately 50%-70% of InterSystems TrakCare clients are deployed in a public or private cloud, with the deployment model varying from infrastructure as a service through to fully managed service offerings:

- Elastic, scalable model through a Kubernetes architecture for customers that require greater flexibility.
- More traditional architecture with virtual servers installed on cloud technology partners such as AWS, Microsoft Azure, Google Cloud, and Alibaba Cloud, in addition to InterSystems Private Cloud.

InterSystems goes to market through regional teams who nurture strong and insightful relationships with local partners, potential customer leaders, and industry influencers to identify the capabilities and technical functionalities required to address their unique strategic needs using its configurable solutions. In some cases, it also provides market education through ad hoc trainings and masterclasses on key initiatives such as interoperability standards adoption.

TrakCare is delivered along with a wide variety of global and regional partners including Nuance, Imprivata, First Data Bank, MIMS, IMO, Ascom, Zebra, Elsevier, Wolters Kluwer, Apple, Microsoft, and The Commons Project.

InterSystems has a target focus on multinational private hospital chains and regional public health systems anchored by inpatient hospitals, including specialty hospitals. Most customer organizations include multiple care settings and deploy TrakCare across all of them to maximize access and ensure an optimal patient and clinical experience.

TrakCare offers a comprehensive range of administrative, clinical, and business management capabilities, ensuring seamless care coordination across care settings and specialized departments within the healthcare ecosystem. TrakCare is aligned with the increasing trends of enabling care anywhere and integrated care models, delivering services outside the physical walls of a traditional hospital. An example of this direction is from the Italian Academic Medical Center Gemelli, in Rome. In this case, TrakCare was integrated with a special digital patient engagement module that enables virtual care appointments for children suffering from chronic diseases. The quick and easy access to the real-time healthcare records of young patients eases interactions between clinicians and families.

Strengths

- **Interoperability, openness, and facilitating innovation.** TrakCare has prioritized these capabilities as key differentiators. InterSystems enables real-time integration with clients' multiple data sources and applications. It supports all key health interoperability standards and profiles including HL7 FHIR and SMART on FHIR. InterSystems stands out for viewing interoperability not just as a technical attribute, but as a clinical and business capability. To foster open access to TrakCare data, it connects natively to InterSystems IRIS for Health FHIR API repository and provides access to all data through REST APIs. InterSystems recently added Swagger API support for developers to further expand documentation and access to data. TrakCare's innovation framework enables customers and partners to use TrakCare data for AI and ML models (e.g., for early identification of sepsis, prediction of readmission rates, intelligent documentation) and for integrating third-party systems, enabling innovative use cases and extensions to the EHR in areas such as clinical research, remote care monitoring, patient apps, and population health management. These features enable integration of insights back into the workflow environment, improving outcomes and experiences.
- **Go-to-market approach.** InterSystems healthcare experts are present in all major European countries to align with local regulatory, policy, and clinical best practices requirements. Customers praise its healthcare industry expertise and commitment to deliver locally relevant content and configurations. Regional innovation teams are dedicated to enhancing local resources and aligning configurations to meet the specific healthcare systems' requirements for their customers.
- **Strong user community.** InterSystems has an established customer base that provides strong referenceability. Long-standing client relationships enable InterSystems to take a tailored and agile approach to configuring TrakCare and related services that deliver business value and represent a good calling card for prospects.

Challenges

- **Customer support.** InterSystems offers a robust support package complemented by a team of seasoned professionals to address concerns. Clients praise InterSystems' capability to collaborate with them in defining solutions that consider their specific requirements in a technically sustainable way. Nevertheless, some of them mention the delivery mechanism sometimes requires additional time to resolve routine issues and ensure timely deployments of specific configurations. This is attributed to the company's rapid expansion, coupled with the dynamic nature of the labor market, leading to a shortage of qualified professionals. Additionally, the configuration requirements – especially for administrative workflows in different local markets – contribute to this.
- **User experience.** The look and feel of the solution's user interface has been revamped, significantly improving information access. InterSystems is now focusing on user experience based on users' roles and clinical workflows, with more sophisticated data visualization developed in partnership with its customer community. Online help is available for every module with videos and content produced by InterSystems, as well as

by customers that want to further support the workforce. Inpatient modules consistently receive high satisfaction ratings from clinicians and administrative managers. On the other hand, according to feedback of certain customers, its ambulatory care functionalities – although holding great potential – may require more extensive customization to reach optimal performance.

Consider InterSystems When

Consider InterSystems if you're a healthcare provider seeking a unified, flexible, and cost-effective EHR solution offering a broad range of capabilities that can be configured to specific needs. For organizations aiming to establish a solid foundation for harnessing AI-powered solutions, InterSystems is a compelling choice. The architecture underpinning its solutions offers a robust framework that effectively ensures data usability and, most importantly, enables integration of insights back into the workflow.

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 with customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape is based on IDC's best estimates of the market share based on the number of customers of the vendor's HER systems.

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

In this IDC MarketScape, IDC Health Insights evaluates software vendors supplying healthcare organizations with electronic healthcare record (EHR) solutions.

For the purpose of this IDC MarketScape, IDC Health Insights defines an EHR as applications and platforms that enable digital versions of patient charts and enable clinicians to securely access real-time information to perform documentation, record-keeping, and decision-making functions at the point of care; and for staff members to use for day-to-day administrative, legal, financial, and operational functions.

EHR products (or software applications) and their related services aid in the management of health information about an individual in healthcare organizations. These solutions serve as a hub for generating a holistic and longitudinal view of person- and population-level data to inform and streamline clinical, operational, and related workflows.

LEARN MORE

Related Research

- *IDC FutureScape: Worldwide Healthcare Industry 2024 Predictions* (IDC #US50105223, October 2023)
- *Leveraging Digital Innovation in the Healthcare Industry* (IDC #EUR151312523, October 2023)
- *IDC Innovators: Remote Patient Engagement and Virtual Care Solutions, 2023* (IDC #US50132223, August 2023)

Synopsis

This IDC MarketScape analyzes vendors of EHR systems to healthcare providers in Europe. It evaluates their current capabilities, future strategies, and comparative business in the marketplace. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and highlights the most influential factors for success in this market in the short and long terms. It serves as a valuable guide to help organizations make informed decisions in choosing the most suitable solution provider.

"With the aim to improve quality care, increase operational efficiency, and enhance clinicians' experience, European healthcare providers are actively seeking to harness the value of healthcare data by prioritizing investments in EHR systems," said Adriana Allocato, research manager, IDC Health Insights. "New EHR solutions include a wide breadth of functionalities for ensuring seamless data interoperability and integration as a foundation for data-driven care."

"Healthcare organizations understand that meeting current demand for healthcare services requires a strategy that not only prioritizes improved and equitable outcomes, but also empowers the workforce and enhances operational efficiency. Adopting reliable, secure, and scalable EHR solutions underpinned by an architecture that emphasizes technical, semantic, and process interoperability is crucial to meet these complex demands. They aim to unleash health data's potential, ensuring intelligent, seamless experiences and facilitating connections with broader healthcare ecosystems, paving the way for innovation and resilience," said Silvia Piai, research director, IDC Health Insights.

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.

IDC Italy

Viale Monza, 14
20127 Milan, Italy
+39.02.28457.1
Twitter: @IDCItaly
idc-insights-community.com
www.idcitalia.com

Copyright and Trademark Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, telebriefings, and conferences. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit www.idc.com/offices. Please contact the IDC Hotline at 800.343.4952, ext. 7988 (or +1.508.988.7988) or sales@idc.com for information on applying the price of this document toward the purchase of an IDC service or for information on additional copies or web rights. IDC and IDC MarketScape are trademarks of International Data Group, Inc.

Copyright 2023 IDC. Reproduction is forbidden unless authorized. All rights reserved.

