

IDC MarketScape: Worldwide DaaS 2025 Vendor Assessment

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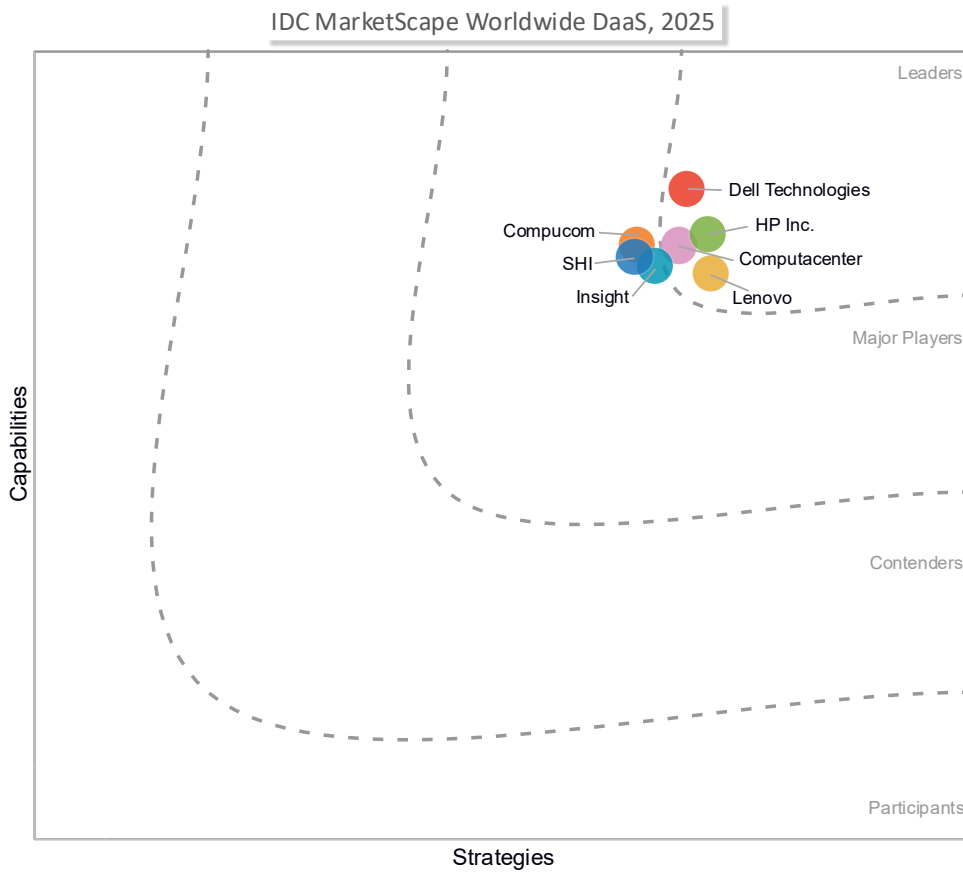
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THIS EXCERPT FEATURES DELL TECHNOLOGIES AS A LEADER IDC MARKETSCOPE FIGURE

FIGURE 1

IDC MarketScape Worldwide DaaS Vendor Assessment



Source: IDC, 2025

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 DaaS 2025 Vendor Assessment (Doc # US53783925).

IDC OPINION

The role devices play in a business has steadily evolved in the past two decades, and this is changing how corporate IT is approaching device procurement and management. Once upon a time, IT was authoritarian and centralized. IT strategies were built around cost and security, eschewing any end-user sentiment in favor of cold, calculated efficiency.

Fast forward to around 2016, and the end-user resistance rises. Demographic changes shifted toward millennials, many of whom grew up as digital natives, with strong preferences for the technology they used. This thrust the employee experience front and center, and over time, talent retention and recruitment has increasingly become tied to technology choices.

This, in turn, has made managing the device fleet significantly more complex for IT managers. Instead of managing four SKUs from one brand across the entire organization, for example, now IT managers must consider multiple designs and configurations from multiple brands across multiple operating systems.

Keeping employees satisfied with their technology also means sticking to frequent and regular refreshes while keeping up with the latest technologies. Keeping them productive means minimizing any device downtime. Both of these actions can be large resource drains on IT departments. And with IT tasked with other high-impact strategic swings like cloud and AI, resources are precious few these days.

In short, managing a modern fleet of devices can be not only complex but costly. Such is IT's dilemma today. How do you keep employees happy and costs down while driving other IT projects and rollouts? Enter device as a service (DaaS), which has helped many organizations liberate IT resources while boosting employee utility.

DaaS combines hardware, software, and services in a periodically billed agreement. A typical DaaS seat starts with a device wrapped in life-cycle services. The device is typically owned, maintained, and refreshed by the provider, and the contract can include other elements such as software, management, and other IT services.

DaaS vendors can help IT offload anything from factory imaging to break/fix and management all the way to its end of life with data sanitization and disposal. This has helped many organizations cut down costs by eliminating drains in fleet management while opening up resources for IT to finally get to other projects. The periodic billing for a fully serviced device has given finance a sense of predictability when it comes to fleet costs.

Finally, DaaS has helped companies get not only better devices to employees but the right devices to the right user. DaaS vendors also use telemetry to help minimize downtimes and ensure your users stay productive and frustration free. Faster and more regular refresh cadences also mean employees get newer and more secure tech more frequently. Organizations with employee experience in mind need to consider DaaS.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

Vendors included in this study must have DaaS programs available directly to the institutional buyers. DaaS must be a principal activity of the vendor, and the vendor must offer devices and life-cycle services at the minimum. Additional offerings such as software (whether first party or resell) or other IT services such as managed print or network integration could be included in DaaS agreement.

In addition, DaaS vendors had to meet the following criteria:

- Provide hardware, software, and services
- \$20 million in annual DaaS revenue
- 50,000+ active DaaS seats

ADVICE FOR TECHNOLOGY BUYERS

Because of the breadth of hardware and services available from DaaS vendors, agreements can range from highly selected to all encompassing. The goal for any IT shopper should be to find the right package and right vendor that makes sense for their organization. The remainder of this section addresses the former, while the subsequent section tackles the latter.

Prospective adopters of DaaS should be cognizant of the elements described in this section that go into a DaaS engagement.

Devices

As aforementioned, one of the key benefits of DaaS is getting employees better hardware at faster clips. Organizations with diverse end-user needs should look for

vendors with wide product portfolios. Some focus on PCs, while others may provide tablets and phones through their DaaS programs. Extra consideration should be paid to those that support multiple OSs.

Life-Cycle Services

From factory to deployment and then to end of life, DaaS vendors provide all the necessary services to ensure devices get up to a sprint quickly and stay running throughout useful life. At the factory, vendors can do kitting and imaging. Once deployed, vendors can handle any break/fix as well as disposal. Vendors can typically customize the services basket to fit in with whatever the organization needs.

Device Management

The most comprehensive of DaaS packages typically fully offloads fleet management to the partner. A good DaaS partner not only can take up day-to-day fleet operations, thereby freeing up significant IT resources, but they can provide additional fleet care such as predictive diagnostics, regular device refresh, and device rightsizing.

Software

Not every DaaS vendor will have first-party software to sell, but most resell third-party software in some capacity. This allows DaaS vendors to fold in SaaS agreements into their broader DaaS contracts. Buyers looking to streamline could find ways to bundle desktop, productivity, and security software into their DaaS payments.

Other Hardware

Some vendors can provide additional hardware categories through anything as a service (XaaS) such as AR/VR, print, and even infrastructure. Organizations that regularly purchase such hardware may find it prudent to inquire whether these could be combined into a single DaaS contract.

Other Services

Some vendors might provide additional services beyond the box. These may include application development, network integration, and even business processes outsourcing. Organizations that also rely on these services should start with a vendor that can offer such services.

VENDOR SUMMARY PROFILE

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.

Dell Technologies

Dell Technologies is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide DaaS.

Dell Technologies is a global IT provider offering a comprehensive range of enterprise solutions. It offers one of the industry's broadest technology and services portfolios, spanning everything from end-user devices to datacenter and cloud infrastructure. Dell's enterprise focus is evident in its strategy for Dell APEX-as-a-Service, which delivers full-stack IT solutions on a subscription basis.

Strengths

Dell's APEX PC as a Service (PCaaS) simplifies PC deployment, management, support, and retirement under a predictable monthly subscription. Organizations can customize plans across Dell's entire PC portfolio, inclusive of the latest devices, software, and support services, with a range of annual terms and the ability to scale up or down as needed.

Dell's broad IT ecosystem is a major advantage. The APEX portfolio now spans PCs, servers, storage, and cloud platforms, enabling a unified as-a-service experience across the infrastructure stack. This means enterprises can partner with Dell not only for devices but also for back-end IT needs, leveraging a single vendor for cohesive solutions. With its global reach and extensive support network, Dell can serve distributed enterprises effectively while offering financial flexibility through Dell Financial Services for its PCaaS subscriptions.

Challenges

Dell's PCaaS is naturally centered on Dell hardware, whereas some companies emphasize multivendor or multi-OS device management for heterogeneous fleets. Organizations with diverse device environments or those concerned about vendor lock-in may view this as a limitation. Dell is in the process of transitioning from a traditional hardware supplier to a solutions-oriented provider, and it must overcome any lingering perceptions of being a hardware-only provider.

Consider Dell Technologies When

Dell Technologies could be the ideal partner for enterprises seeking an integrated, one-stop IT solution. Consider Dell Technologies when your organization values predictable costs, regular technology refresh cycles, and reliable support in managing your employee devices. It is especially well suited for companies willing to standardize on

Dell Technologies' PC lineup and looking to offload the life-cycle management workload. If you plan to align end-user computing with broader infrastructure initiatives (e.g., using on-premises or cloud solutions from the same vendor), Dell Technologies' combined device and infrastructure-as-a-service capabilities make the company a strong fit.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

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

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

DaaS combines hardware, software, and services in a periodically billed agreement. A typical DaaS seat starts with a device wrapped in life-cycle services. The device is typically owned, maintained, and refreshed by the provider, and the contract can include other elements such as software, management, and other IT services.

LEARN MORE

Related Research

- *Worldwide IT Leasing and Financing Forecast, 2025–2029* (IDC #US52192125, July 2025)
- *Worldwide PC Forecast Update, 2025–2029: 1Q25* (IDC #US52403825, June 2025)
- *Worldwide PC Market Shares, 1Q25: Tariff Fears Help Drive Market Growth* (IDC #US52403325, June 2025)
- *IDC's 2025 IT Flexible Consumption Procurement Models Survey: Understanding Customers' Top Requirements and Key Drivers* (IDC #US52043724, April 2025)
- *IDC Survey: PC-as-a-Service and Device-as-a-Service Sustainability and Circularity Insights* (IDC #US52192525, March 2025)
- *Worldwide PC Forecast, 2025–2029* (IDC #US53231825, March 2025)
- *The Role of the AI PC in Your Next Fleet Refresh* (IDC #US52762424, December 2024)
- *Market Analysis Perspective: Worldwide IT Service Strategies for Proactive Customer Success, 2024* (IDC #US52583424, September 2024)

Synopsis

This IDC study provides an assessment of device-as-a-service (DaaS) providers through the IDC MarketScape model.

"Managing modern device fleets is both complex and costly, posing challenges for IT in balancing employee satisfaction, cost control, and strategic initiatives," said Linn Huang, research vice president, Devices and Displays, IDC. "As organizations evaluate device-as-a-service offerings, the key lies in selecting a vendor whose breadth of hardware, life-cycle services, and management capabilities aligns with their unique needs. From diverse device portfolios to comprehensive fleet management and software integration, DaaS agreements can be tailored to optimize both employee experience and IT efficiency."

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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