

## COMPETITIVE ANALYSIS

### Clientless Remote Support Services Market

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#### IDC OPINION

The market for remote control software is not a new market; however, the technology to assume control of a PC without having previously installed software on that PC has only been available for a few years. This ability has the potential to open new markets for support services providers by reducing the cost of providing these services. Specifically, the technology will gain the most traction in markets where the services providers cannot control the end-user environment and thus cannot ensure that software is preinstalled on the PC. IDC believes that these tools will have the most impact in the following markets and vendors should focus on the following aspects of their solutions:

- ☒ The clientless remote support tools may reduce the cost of providing support services to consumers to a point where this is finally a profitable market. This market is extremely large, but has not been able to be profitably serviced. Several third-party services providers have already begun experimenting with using this technology to approach this market.
- ☒ Technology vendors that sell a considerable amount of products to consumers and SMBs should investigate this technology as a method of reducing the costs of providing support services. The tools have the ability to improve the overall customer experience and improve customer loyalty.
- ☒ Remote support tools vendors need to focus on ensuring their tools both are secure and offer the ability to record and audit a remote support session. End users will be turning over control of their PCs, which often contain personal information, to an unknown individual. To help alleviate the concerns associated with this, vendors need to incorporate security features that can help protect end users. Additionally, the software needs to be able to be audited so that if an end user feels his data or privacy was violated, the session can be audited.



## IN THIS STUDY

This IDC study reviews the current leading players in the clientless remote support market. This market is characterized by software or hardware solutions that enable an IT support professional to remotely control an end user's PC without having any software already installed on that device. Eliminating the requirement that the end user already have client software installed differentiates these solutions from the previous generation of remote support tools.

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## Methodology

### *Selection of Profiled Vendors*

Profiled vendors in this study include:

- Citrix Online
- LogMeIn
- NetworkStreaming
- NTR Global
- WebEx

In determining which vendors to include, IDC looked at the top remote access vendors and determined if they had a product or solution that specifically targeted the support services market and if that solution did not require preinstalled client software. Each of these companies was surveyed regarding the features and pricing of their offerings.

Additional companies were asked to participate in this series of interviews, but they declined to do so and, as a result, are not included in this study.

## SITUATION OVERVIEW

Supporting end customers has traditionally been a challenge for hardware and software vendors. Often the responsibility for support the end user in a business setting has fallen on the internal help desk. In the consumer market, most vendors provide some form of telephone support services. These services are often not very satisfactory to the consumers, and many of them are left angry at the hardware or software vendor. The results are reduced brand loyalty and potentially reduced upgrade or replacement sales.

In the enterprise setting, the use of remote support tools is becoming increasingly pervasive. Software and hardware vendors are developing and embedding tools that will allow them to remotely monitor, diagnose, and fix potential problems. Generally, these tools are being embedded in large enterprisewide software applications, such as ERP and CRM systems, and large hardware systems, such as servers, storage,

and networking equipment. In client devices, the use of remote support that will enable help desk personnel to access an employee's PC or laptop remotely is being included in other applications. Additionally, the corporate IT staff of a large enterprise can install client-based software on the employee's client and ensure that it is configured correctly so that when they need to remotely access the device, they can. These solutions work well in this controlled setting.

However, in the SMB market, where the corporate IT staff is not as robust, and in the consumer market, pre-installing client software may not be possible. In these situations, supporting the end users becomes more difficult. Generally, the support professional has to talk the user through fixing the problem. This generally takes longer and is more difficult for both the support professional and the end user and often leads to only a partial fix or a workaround.

Over the past few years, there have been technology improvements that can address these problems. Specifically, the development of clientless remote support tools. These tools do not require the end users to have software already installed on the client device for a support vendor to be able to remotely access the PC or laptop. All that is required of the end users is that they have an Internet connection. The support vendor can use that connection to remotely access the PC and resolve the problem.

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## **Potential Markets**

There are three potential markets for this technology: IT vendors supporting their own products, IT professionals and other third parties using these tools to support consumers or other clients, and internal IT help desks.

### ***IT Vendors***

IT vendors that provide lower-cost products such as PCs/laptops, client software, and operating systems that are targeted at the SMB and consumer space are a good target for this technology. Generally, these vendors are selling their products into an uncontrolled environment. They do not know the level of technical savvy of their customers and cannot guarantee that client software will be properly installed and configured to allow remote access if the customer needs support. Additionally, customers will be reluctant to install software that will allow a vendor to remotely gain access to their PC without their permission. For these vendors, having the option of using a clientless remote support tool to provide assistance to customers will improve the customer satisfaction with the product and can enhance brand image. IT vendors should not rely exclusively on these tools, as some customers will be reluctant to surrender control of their PC for security reasons, but the services should be offered for customers.

### ***IT Professionals Serving the Enterprise or Consumer Market***

Several software and hardware vendors make extensive use of channel partners and other third parties to provide the services around their software and hardware products. For these vendors, this technology has the opportunity to provide a competitive advantage over their competition. Being able to remotely connect to a customer's PC can improve problem resolution time and result in greater customer intimacy.

Additionally, IT support vendors can use these tools to service the consumer market. Traditionally, this has been a very challenging market. IT professionals that are servicing this market are limited to the geographic area they can easily get to. Since a growing number of consumer-related support requirements are software problems, viruses, spyware, and other malicious code, they can be fixed remotely. This increases the geographic reach of these vendors and enables them to service more customers while eliminating travel expenses.

Vendors in this space will need to be able to demonstrate to potential customers that they are not invading the customer privacy or attempting to access private information such as financial records. They can address these fears by implementing strong auditing procedures that are transparent to customers and providing simple-to-use procedures for customers that think the support provider may have acted unethically. To support these procedures, the clientless tools vendors in this space will have to offer strong auditing and session recording capabilities to these services providers.

### ***Internal IT Help Desks***

Internal IT help desks are required to address a variety of end-user problems. In situations where the IT staff and the employees are centrally located, the IT professional can walk over to the end user's office or the user can bring the laptop to IT and have the problem addressed. This luxury, however, is becoming increasingly rare as enterprises are becoming increasingly spread out with employees working from home and branch offices without IT staff becoming prevalent. In these situations, the IT staff needs to address how to support remote employees. In larger enterprises, the IT staff tends to be more robust and have better IT tools and practices in place. As a result, the employees will often have software required for IT to remotely connect to their PCs installed and configured when they receive their PCs. This may not be the case in the SMB market or in large enterprises that do not rely heavily on IT. In these situations, using clientless remote tools such as the ones described in this study can result in better support for remote employees and improved productivity without dramatically increased costs.

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## **Business Models**

This market is in the early stage of development, and as a result, vendors are trying several different approaches to providing this solution to their customers.

### ***Hosted Solution***

Most of the vendors that are in this market are providing the solution as a hosted application. In this business model, the customer or services provider pays a monthly or annual fee to the vendors for the rights to use the software. This approach has advantages for services providers that intend to use these tools to provide support to their customers. This model does not require the customer to make a significant up-front investment in software or hardware. This model is also easy to scale as the customer can just add more seats with the hosted software provider.

### ***Software Solution***

Some vendors are offering the solution under a traditional software licensing model. This model offers advantages for customers that are interested in using this type of solution to support internal employees. Since the software is owned by the enterprise, it can be deployed behind the corporate firewall and thus help minimize some of the security concerns of the enterprises.

### ***Hardware Solution***

The final model being used is a hardware model. In this model, the vendor provides the solution as an appliance that can be installed in a company's datacenter. This model avoids having to install the software on a server while maintaining the advantages of being behind the firewall.

## **FUTURE OUTLOOK**

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### **Vendor Profiles**

#### ***Citrix Online***

Citrix Online, a division of Citrix Systems, was created in 2003 when Citrix acquired Expertcity. Currently, Citrix Online has three services: GoToMyPC, GoToAssist, and GoToMeeting. Citrix Online generated \$99 million in revenue in calendar 2005 and represents approximately 10% of the company's overall revenue.

GoToAssist is Citrix Online's remote support product. The solution is offered as a hosted offering that makes the solution easily scalable to geographically diverse sites. To address security concerns, the entire session is recorded and can be stored in the customer's database. GoToAssist can be integrated into a customer's CRM or help desk software, and the recorded session can be stored in these packages. Additionally, the connection is 128 bit end to end encrypted for security. GoToAssist has recently added a manager's dashboard to better enhance management oversight of help desk professionals. This dashboard enables a supervisor to monitor personnel status and view the customer queue. Table 1 provides an overview of the solution.

**TABLE 1**

## Citrix Online Clientless Remote Support Offering

	Citrix GoToAssist
Deployment model (software, appliance, hosted solution)	Hosted on-demand solution
Does the solution require software to be pre-installed on the client device?	No
Size of the remote download (if applicable)	600K
Zero footprint install/uninstall (if applicable)	Since GoToAssist is never installed on the remote PC, an uninstall is not necessary.
Price	Annual contracts; named user licensing; flat fee for unlimited number of representative sessions per license (no license required for client side); cost per seat varies based on total number of seats purchased. Advanced feature and integration options sold separately.
Session logging and reporting features (e.g., record of each action, video playback of the session, etc.)	GoToAssist's online Management Center provides functions, including session monitors and a customizable manager's dashboard, and 13 different reports, including summary and details by session, by team, by individual rep, by entry point, etc. Central storage and playback of session recordings are available through the online Management Center, as well as centralized storage of chat logs and diagnostics.
Customization (Does the solution allow customized URLs, splash screens, or Web interfaces to allow customers to "brand the solution"?)	Yes the solution allows customized URLs, splash screens, and Web interfaces to allow customers to "brand the solution."
Method of connecting to the client device (Internet, frame relay, VPN, etc.)	Internet
Does the solution support file transfer and chat?	Yes, the solution allows for multiple file/folder transfers in a single operation and multiple simultaneous chat sessions with up to eight customers.
<b>Security features</b>	
Level of encryption used	GoToAssist uses end-to-end 128-bit AES encryption. We offer public/private-key encrypted session recordings stored on a central server located in a secure data center or stored locally on the customer's premise database.
Level of control (full control of the client device or limited functional control)	The GoToAssist solution allows for full two-way control of the client device or can be restricted to view only.

**TABLE 1****Citrix Online Clientless Remote Support Offering**

	Citrix GoToAssist
Can remote control be initiated without end-user approval? (Does the end user have to give permission to begin a session?)	Full permission is required to start a GoToAssist session, to start screen sharing, to approve file/folder transfers, to approve gathering of remote diagnostics, and to approve reboot/reconnect. Once a GoToAssist session is ended, there is no possible way for the representative to get access to the machine without the customer re-initiating the GoToAssist connection/approval process to get into session.
Can the end user terminate a session at any time or override the support representative?	Yes, GoToAssist sessions can be terminated at any time by the customer or end user and the customer has complete override control of the mouse.
Can the solution run without admin rights on the client device?	Yes, the GoToAssist solution never requires admin rights on the client side to form a connection. All that is needed on the client side is any browser and Internet connectivity.
Number of sessions that can be supported by a single copy of the software/hardware (not applicable for hosted solutions)	NA
Number of simultaneous sessions that a single professional can support	Eight full GoToAssist sessions can be supported simultaneously by a single professional.

Source: IDC, 2006

***LogMeIn***

LogMeIn was established in 2003 as 3am Labs by the creators of RemotelyAnywhere. They are headquartered in Woburn, Massachusetts, and have recently changed their name to LogMeIn Inc. They currently offer three products that target the support services market: LogMeIn Rescue, RemotelyAnywhere, and LogMeIn IT Reach. LogMeIn Rescue is the main support services product and is more applicable for vendors that are trying to support a base of end users that are not internal to the vendors. RemotelyAnywhere and LogMeIn IT Reach are targeted at IT professionals that are using the product to provide support and monitoring services to internal customers. LogMeIn Rescue and LogMeIn IT Reach are hosted solutions and RemotelyAnywhere is an on-premises software solution that works within a LAN environment. RemotelyAnywhere and LogMeIn IT Reach requires that client devices have some software pre-installed. Table 3 shows the details of the LogMeIn Rescue, RemotelyAnywhere, and LogMeIn IT Reach. Table 2 provides an overview of these solutions.



**TABLE 2**

## LogMeIn Clientless Remote Support Offerings

	LogMeIn Rescue	RemotelyAnywhere	LogMeIn IT Reach
Deployment model (software, appliance, hosted solution)	Hosted solution	Software	Hosted solution
Does the solution require software to be pre-installed on the client device?	No	Yes	Yes
Size of the remote download (if applicable)	589Kb	5.89Mb	3.8Mb
Zero footprint install/uninstall (if applicable)	Yes	Very minimal	Very minimal
Price	Per technician seat (annual agreement): \$99 per month; Per technician seat (monthly agreement): \$129 per month	\$199 for the server edition, \$99 for the workstation edition	10 systems: \$69.95 per computer per year; 25 systems: \$54.95 per computer per year
Session logging and reporting features (e.g., record of each action, video playback of the session, etc.)	Rescue logs all technician activities and chat content per session. Video screen recording can be either technician initiated or forced on an administrator level. Rescue's report generator can measure helpdesk performance and track activities. Select specific users or user groups, report area, report type, date range and daily time periods. There are several report areas including: Performance, Sessions, Customer Surveys, Logins, and Custom data. Reports can be detailed or summary. All reports can be displayed in HTML or exported to Excel.	When connecting to a RemotelyAnywhere computer a log file is generated to monitor and track the session activity. The file can be accessed on the host machine at any time or can automatically be written to an ODBC or Syslog database for storage and reporting purposes. Remote sessions can also be recorded for video playback	When connecting to an IT Reach computer a comprehensive log file is generated to monitor and track the session activity. The file can be accessed on the host machine at any time or can automatically be written to an ODBC or Syslog database for storage and reporting purposes. All log ons to the web site are also tracked centrally and can be downloaded at any time. Remote sessions can also be recorded for video playback
Customization (Does the solution allow customized URLs, splash screens, or Web interfaces to allow customers to "brand the solution"?)	Yes. Users can initiate sessions from the provider's Web pages and add logos to the client interface.	To some extent. Logos can be added in some screens and the log in for RemotelyAnywhere can be integrated into other Web pages.	To some extent. Logos can be added in some screens and the log in for LogMeIn IT Reach can be integrated into other Web pages.

**TABLE 2**

## LogMeIn Clientless Remote Support Offerings

	LogMeIn Rescue	RemotelyAnywhere	LogMeIn IT Reach
Method of connecting to the client device (Internet, frame relay, VPN, etc.)	Internet	Able to connect from any computer to a host with a static IP address that has RemotelyAnywhere installed	Internet
Does the solution support file transfer and chat?	Yes, dual-pane, drag-and-drop file transfer with copy, move, synchronize, and replicate facilities. Chat for up to 10 simultaneous sessions comes as standard.	Yes, dual-pane, drag-and-drop file transfer with copy, move, synchronize and replicate facilities. Two-way chat comes as standard.	Yes, dual-pane, drag-and-drop file transfer with copy, move, synchronize, and replicate facilities. Two-way chat comes as standard.
<b>Security features</b>			
Level of encryption used	128-256 end-to-end SSL encryption for compliance with HIPAA, Sarbanes-Oxley, and other federal and local legislation. Plus MD5 # for file transfer.	128-256 end-to-end SSL encryption. In addition to this, there are multiple layers of security including Windows authentication on the client machine, integration with RSA, and locally stored personal password. Further, it's possible to add IP filtering and IP lockout to provide an extremely comprehensive range of security features.	128-256 end-to-end SSL encryption. In addition to this there are seven layers of security including Web site user name and password, one-time emailed passwords, preprinted passwords, Windows authentication on the client machine, integration with RSA, and locally stored personal password. Further, it's possible to add IP filtering and IP lockout to provide an extremely comprehensive range of security features.
Level of control (full control of the client device or limited functional control)	The product fully integrates with existing Windows access rights on the remote machine. In addition, each user's access rights can be customized further within the product to limit the level of control and the access to different computer information. Further, at the time of connection the client can grant or deny technician access to different features.	The product fully integrates with existing Windows access rights on the remote machine. In addition, each user's access rights can be customized further within the product to limit the level of control and the access to different computer information.	The product fully integrates with existing Windows access rights on the remote machine. In addition, each user's access rights can be customized further within the product to limit the level of control and the access to different computer information.

**TABLE 2**

## LogMeIn Clientless Remote Support Offerings

	LogMeIn Rescue	RemotelyAnywhere	LogMeIn IT Reach
Can remote control be initiated without end-user approval? (Does the end user have to give permission to begin a session?)	The end user has to give permission to begin a new session. Rescue can be configured to run in a single permission mode that allows unattended usage of the remote PC after the initial permission is granted. There is also a facility for unattended reboot and reconnect.	Yes, the product is designed for unattended access. Most computer administration tasks can be carried out without disrupting the end user even if he is at the computer. Remote control notification though is displayed on the client machine whenever it is being monitored or remote controlled.	Yes, the product is designed for unattended access. Most computer administration tasks can be carried out without disrupting the end user even if he is at the computer. Remote control notification though is displayed on the client machine whenever it is being monitored or remote controlled.
Can the end user terminate a session at any time or override the support representative?	Yes	Yes	Yes
Can the solution run without admin rights on the client device?	Yes	The solution can run without admin rights but they are needed for the initial installation.	The solution can run without admin rights but they are needed for the initial installation.
Number of sessions that can be supported by a single copy of the software/hardware (not applicable for hosted solutions)	NA	The software is installed on each client machine. A session can only take place when the software is in place.	The software is installed on each client machine. A session can only take place when the software is in place.
Number of simultaneous sessions that a single professional can support	Rescue's Technician Console interface allows one technician to run up to 10 simultaneous sessions and connect to an unlimited number of machines.	Limited only by the bandwidth of the user	Limited only by the bandwidth of the user

Source: IDC, 2006

### **NetworkStreaming**

NetworkStreaming was founded in 2003 in Ridgeland, Mississippi, and is one of the smallest participants in terms of employees in the remote support and remote access markets. The remote support product is their main product and generates the majority of their current revenue. Table 3 shows an overview of NetworkStreaming.

NetworkStreaming is the only vendor in this market that offers its product as an appliance. As an appliance, the solution can reside inside a customer's firewall, providing an added level of security when supporting end users that are also behind the firewall. The solution also allows the help desk to support end users that are outside the firewall, such as external customers. The drawback to this solution is the addition of another appliance into the datacenter. Space and power are very important to datacenter managers, and as a result, they might not want another appliance in the datacenter. NetworkStreaming should consider developing a software-only solution that they can offer customers a choice of another appliance or installing the software on a server already in the datacenter. The NetworkStreaming solution can also be configured, with the end users' permission, to be able to access the client without the user being present. This can be an advantage in situations where fixing the problem can take some time and require several reboot/reconnect incidents. This feature will be most attractive to internal help desks as the ability to connect to an unattended PC may not be appropriate in situations where the support professional is not part of the same company or in the consumer market. Table 4 shows the features of NetworkStreaming's Support Desk product.

**TABLE 3**

**NetworkStreaming at a Glance**

Category	Data
Corporate headquarters	578 Highland Colony Parkway, Paragon Centre, Suite 300, Ridgeland, MS 39157
Total number of employees	45
Revenue breakdown (%)	
Americas	90
EMEA	9
APAC	1

Source: IDC, 2006

**TABLE 4**

## NetworkStreaming Clientless Remote Support Offering

	Support Appliance running SupportDesk
Deployment model (software, appliance, hosted solution)	Appliance (software residing on an appliance)
Does the solution require software to be pre-installed on the client device?	No
Size of the remote download (if applicable)	<300K
Zero footprint install/uninstall (if applicable)	Yes
Price	Perpetual license: \$3,690 for appliance and one license; \$1,695 per additional concurrent license
Session logging and reporting features (e.g., record of each action, video playback of the session, etc.)	Session ID, parent session ID, start/end time, duration, accepted, rep's public IP, rep's private IP, rep's computer name, rep's name, customer's public IP, customer's private IP, customer's name, customer's computer name, average rep to customer bandwidth, average customer to rep bandwidth, control enabled, file transfers from rep to customer, file transfers from customer to rep, number of chat messages, chat transcript
Customization (Does the solution allow customized URLs, splash screens, or Web interfaces to allow customers to "brand the solution"?)	Yes. The public site is fully customizable, and the splash screen allows for certain customizations if required. The URL is also completely customizable.
Method of connecting to the client device (Internet, frame relay, VPN, etc.)	Outbound Internet connection. Works through any firewall, proxy server, or NAT. Even works with no Internet connection if end user is on the same LAN/WAN as the appliance.
Does the solution support file transfer and chat?	Yes
<b>Security features</b>	
Level of encryption used	256-bit AES SSL encryption
Level of control (full control of the client device or limited functional control)	Full mouse, keyboard, and program control of the remote computer is possible with the permission of the end user.
Can remote control be initiated without end-user approval? (Does the end user have to give permission to begin a session?)	Yes. Because the connection is outbound, the end user must initiate the session and grant permission before the representative can gain any level of screen sharing or remote desktop control.
Can the end user terminate a session at any time or override the support representative?	The end user can terminate the session at any time, and the end user maintains overriding mouse and keyboard control.
Can the solution run without admin rights on the client device?	Yes

<b>TABLE 4</b>	
NetworkStreaming Clientless Remote Support Offering	
	Support Appliance running SupportDesk
Number of sessions that can be supported by a single copy of the software/hardware (not applicable for hosted solutions)	A single NetworkStreaming Support Appliance can handle 200 to 300 simultaneous sessions.
Number of simultaneous sessions that a single professional can support	Limited only by bandwidth

Source: IDC, 2006

***NTR Global***

NTR Global was founded in 2000 in Barcelona, Spain. Since then it has expanded to seven offices: five in Europe, one in Japan, and one in North America. NTR Global receives most of its revenue from EMEA. The five offices in EMEA are located in Barcelona, Paris, Heidelberg, Milan, and London; its Japanese office is in Tokyo; and its North American headquarters is in Dallas, Texas. It currently has products that compete in three markets: remote support, remote control, and remote access. This profile concentrates on the remote support product InQuiero. Table 5 shows an overview of NTR Global.

The InQuiero product is offered as either a hosted solution or as a traditional software product that can be installed on a customer's servers. NTR developed the solution with the bandwidth limitations of the European community in mind. Generally, the implementation of broadband to the consumer was not as quickly deployed as in the United States. As a result, InQuiero has the smallest download of all the solutions currently on the market. This is an advantage for NTR global in that customers can get into a support session faster than their competitors. InQuiero also allows the operator to adjust the color resolution from two colors to True Color during the remote control session, to compensate for possible lack of bandwidth. The solution also offers several security features that will help alleviate customers' fears associated with allowing someone to remotely access their PCs. The most important of these is a complete video replay of the session, which can be audited in case a customer feels the support professional acted inappropriately. This feature can be configured so that the support professionals cannot disable it. Additionally, the administrators can configure the level of access that support professionals have. Table 6 provides an overview of NTRSupport offering.

**TABLE 5**

## NTR Global at a Glance

Category	Data
Corporate headquarters	Barcelona, Spain; America's HQ: Dallas, TX
Total number of employees	200+
Revenue breakdown (%)	
Americas	30
EMEA	65
APAC	5

Source: IDC, 2006

**TABLE 6**

## NTR Global Clientless Remote Support Offering

	NTRSupport (InQuiero)
Deployment model (software, appliance, hosted solution)	ASP and On-Premise
Does the solution require software to be pre-installed on the client device?	No
Size of the remote download (if applicable)	50–70KB, depending on download (is available as Active X and .exe)
Zero footprint install/uninstall (if applicable)	Yes, the footprint automatically uninstalls after the session.
Price	Pricing is tiered and depends on platform used and whether any optional modules are purchased. Average price for 1 ASP Operator license is \$2,100 per year with five installable remote controls (IRCs) included free of charge with each Operator license.
Session logging and reporting features (e.g., record of each action, video playback of the session, etc.)	Yes, chat log, session recording and replay, videoconference capability, VoIP
Customization (Does the solution allow customized URLs, splash screens, or Web interfaces to allow customers to "brand the solution"?)	Yes, online buttons and chatbox (end-user side) can be customized, operator configuration, reporting and surveys can all be customized by the customer, operator console can be customized with NTR's assistance.
Method of connecting to the client device (Internet, frame relay, VPN, etc.)	Via Internet or via LAN/WAN

<b>TABLE 6</b>	
NTR Global Clientless Remote Support Offering	
	NTRSupport (InQuiero)
Does the solution support file transfer and chat?	Yes
<b>Security features</b>	
Level of encryption used	256-bit AES Encryption
Level of control (full control of the client device or limited functional control)	Default setting is to let operator decide on case-by-case basis if level of control is full shared control or observer only, but administrator can restrict this at the operator level if so desired.
Can remote control be initiated without end-user approval? (Does the end user have to give permission to begin a session?)	End user must give permission for "on demand" sessions. InQuiero contains "installable remote control" component that must initially be installed with customer's permission but can then be used to access remote machine after hours, so without "session by session" permission.
Can the end user terminate a session at any time or override the support representative?	Yes
Can the solution run without admin rights on the client device?	Yes
Number of sessions that can be supported by a single copy of the software/hardware (not applicable for hosted solutions)	Unlimited
Number of simultaneous sessions that a single professional can support	Up to five — can be configured or limited by the administrator

Source: IDC, 2006

**WebEx**

WebEx is one of the largest competitors in this market. They offer a full suite of remote access and remote control products that address a wide range markets including on-line meetings, sales tools, training, and support. This profile concentrates on the WebEx products that are being used to provide support services. Specifically these products are Remote Support, Remote Access, and the System Management Service, all part of the WebEx Support Center suite. Table 7 provides an overview of the company.

Of the three products that are being used for customer support, WebEx Support Center-Remote Support is most directly applicable to the support services market. This product enables support professionals to connect to an end user's PC and provide on demand support services. It is offered as a hosted solution. WebEx also offers the System Management Services and Remote Access products to enhance



customer support. These solutions require that the customer have an agent installed on their PC and are used to augment the functionality of Remote Support by providing features such as monitoring and the ability to connect to an unattended PC. These products are better received in situations where the support professionals and the customer will have an ongoing relationship, such as with VARs that are providing support to their clients and technology vendors that are providing support to business customers. Table 8 shows an overview of WebEx support offerings.

**TABLE 7**

WebEx at a Glance

Category	Data
Corporate headquarters	Santa Clara, California
Total number of employees	2,000
Total revenue (2005)	\$308 million
Revenue breakdown (%)	
United States	87
ROW	13

Source: IDC, 2006

**TABLE 8**

WebEx Clientless Remote Support Offerings

	WebEx Support Remote Support	WebEx Remote Access	WebEx System Management Service
Deployment model (software, appliance, hosted solution)	Hosted, on-demand solution	Hosted, on-demand solution	Hosted, on-demand solution
Does the solution require software to be pre-installed on the client device?	No	yes	Yes
Size of the remote download (if applicable)	3.2MB	4.4MB	4.9MB

**TABLE 8**

## WebEx Clientless Remote Support Offerings

	WebEx Support Remote Support	WebEx Remote Access	WebEx System Management Service
Price	Starting at \$150 per month per support representative	Starting at \$150 per 20 computers	\$5 to \$15 per computer, depending on services (remote access, asset management, software distribution, patch management, virus protection, backup management) and number of computers
Session logging and reporting features (e.g., record of each action, video playback of the session, etc.)	Yes, detailed session logging and record option	Yes, recording, session logs, and reports available	Yes, detailed reports available
Customization (Does the solution allow customized URLs, splash screens, or Web interfaces to allow customers to "brand the solution"?)	Yes	Yes	Yes
Method of connecting to the client device (Internet, frame relay, VPN, etc.)	Internet	Internet	Internet
Does the solution support file transfer and chat?	Yes	Yes	Yes
<b>Security features</b>			
Level of encryption used	SSL	SSL	SSL
Level of control (full control of the client device or limited functional control)	Admin can define control level by support rep level (e.g., level 1 rep can only control specific app).	Admin can define control.	NA

**TABLE 8****WebEx Clientless Remote Support Offerings**

	WebEx Support Remote Support	WebEx Remote Access	WebEx System Management Service
Can remote control be initiated without end-user approval? (Does the end user have to give permission to begin a session?)	No, end user must give permission.	Driven by configuration settings	NA
Can the end user terminate a session at any time or override the support representative?	Yes, end user can end session.	NA	NA
Can the solution run without admin rights on the client device?	Yes	To install, admin right is needed. Domain impersonation feature available to impersonate as an administrator. To run, no admin right is needed.	To install, admin right is needed. Domain impersonation feature available to impersonate as an administrator. To run, no admin right is needed.
Number of sessions that can be supported by a single copy of the software/hardware (not applicable for hosted solutions)	NA	NA	NA
Number of simultaneous sessions that a single professional can support	One session per agent; can have multiple agents in a single session	No limit	No limit

Source: IDC, 2006

**ESSENTIAL GUIDANCE****Market Adoption**

The remote control market has been around for several years and as a result, many enterprises are familiar with it and have been using remote control to support their end users. However, the ability to remotely control an end user's PC without previously having installed software is a recent enhancement to the software tools. This enhancement potentially opens the door to new markets for tech support that have traditionally been underserved. These markets have been ignored by the support providers because they are highly cost sensitive and thus could not be served profitably. Specifically, IDC believes that this technology can be used to provide

support services to consumers and in the SMB segment where the IT staff is not as robust as in large enterprises.

IDC believes that this technology will be adopted first by IT professionals, such as VARs and SIs that service the SMB segment. The tools will enable them to provide support services to their customers in a more cost-effective manner. Additionally, they offer the ability to improve customer services and thus gain greater customer loyalty.

The next group that will adopt the tools will be technology vendors and third-party services providers that target the consumer segment. The technology vendors will use the technology to enable their tech support professionals to provide support to their end users. Using these tools, the technology vendor can improve the quality of support and reduce the amount of time the support professional spends resolving problems. This can result in higher customer satisfaction and reduced cost. Third-party services providers will use this technology to launch new services targeting the end consumer. Examples of the types of services that third parties that can be offered are virus and spyware removal and software installation and upgrade failures.

The final group that will be interested in deploying this technology is the internal help desks of SMBs. This group is expected to take the longest to adopt these tools. Customers that do not have a robust IT staff are more likely to use external providers for support services while enterprises that have a more robust IT staff are more likely to have the processes and tools in place to install software on every client device, thus eliminating the need to use a clientless remote support tool.

### ***Advice for Vendors***

The markets that these tools will enable have different requirements. Technology vendors that are trying to support their customers have different needs than third parties that are using these tools to support consumers. As a result, vendors need to consider offering the solution in a variety of forms. Offering only a hosted solution or only a hardware or software solution may result in some market segments choosing other vendors.

Vendors will need to ensure that their solutions are priced competitively and are easy for the support professional to use. One of the major appeals of these tools is their potential to reduce the cost of providing support services by improving efficiency. Given this, the cost of the tools will be closely scrutinized by customers and the vendors will need to ensure they are competitive. Further, if the tools are not easy for the support professionals to use, they will not gain the market acceptance they could because they will not result in the improved efficiency that enterprises are expecting.

Finally, vendors will need to ensure their tools provide the level of security that end users expect. End users will be turning over control of their PCs to, in most cases, an unknown individual. This will be a cause of concern for many customers. Vendors can help alleviate these concerns by providing replays of the session, recording every action that the support professional took, and providing this information to the end users.

## LEARN MORE

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### Related Research

- ☒ *Citrix Online Vendor Profile* (IDC #34097, October 2005)
  - ☒ *Worldwide and U.S. Hardware Support and Deploy Services 2005–2009 Forecast* (IDC #33608, July 2005)
  - ☒ *Worldwide and U.S. Software Support Services 2005–2009 Forecast* (IDC #33355, May 2005)
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