

## IDC MarketScape

# IDC MarketScape: Worldwide Cloud Professional Services 2020 Vendor Assessment

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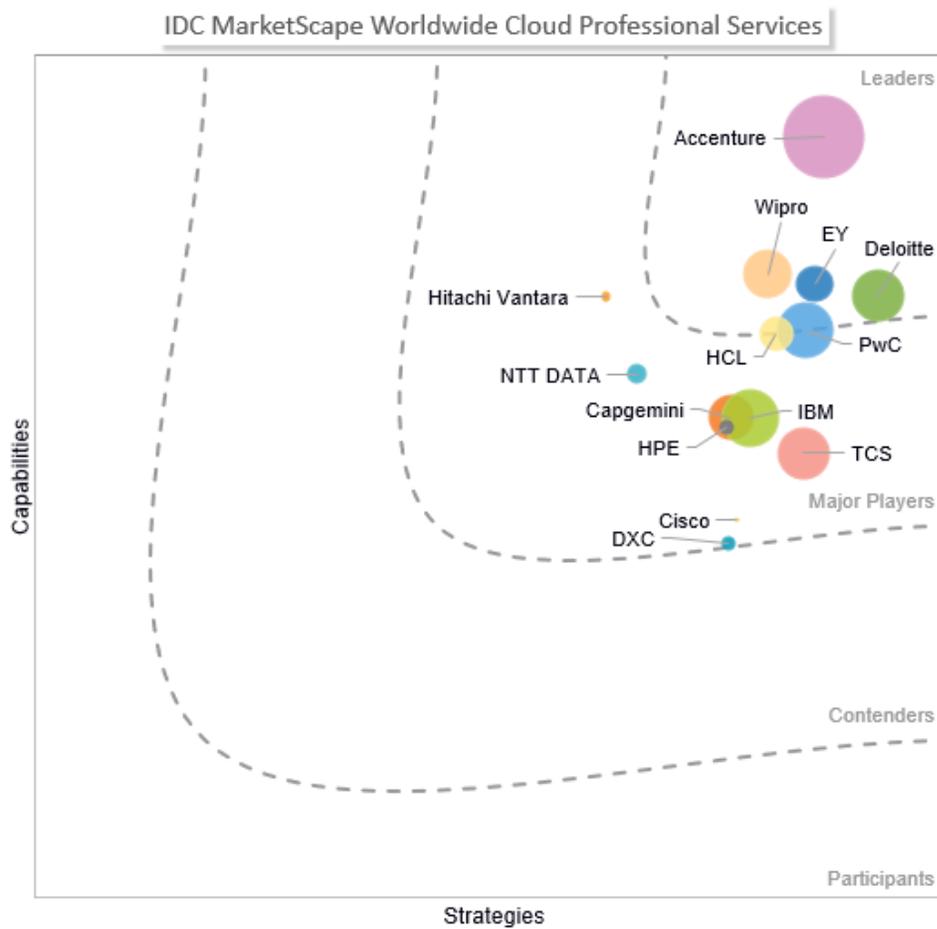
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**THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE**

### IDC MARKETSCAPE FIGURE

**FIGURE 1**

## IDC MarketScape Worldwide Cloud Professional Services Vendor Assessment



Source: IDC, 2020

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

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Cloud Professional Services 2020 Vendor Assessment (Doc # US45439120). 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

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This IDC study represents a vendor assessment of the 2020 cloud professional services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide cloud professional services market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing cloud professional services in both the short term and the long term. A component of this evaluation is the inclusion of the perception of 75 cloud professional services buyers of both the key characteristics and the capabilities of the provider evaluated. Buyers were surveyed across all three of IDC's macroregions. Key findings from the evaluation include:

- Professional services to plan, design, and build both hybrid (combining elements of public and private cloud and on-premises solutions) and multicloud delivery models (combining multiple public cloud services) have become widespread. Beyond cloud technical skills and competence, providers are trying to differentiate on complementary professional services (e.g., business consulting for industry knowledge or agency services for improving customer experience). Many providers also try to differentiate through development of their own cloud integration and/or management platforms. Both hybrid and multicloud delivery models have kept integration/orchestration services a central offering for the providers, but there also has been a rapid increase in the tempo of cloud-native custom software development compared with two years ago.
- When buyers were asked what characteristics were required for a cloud professional services project to be successful at a worldwide level, the most frequently mentioned were "provide an appropriate and high-quality team for the project" and "project value delivered for fee paid." The least frequently mentioned characteristics were "leverage resources globally" and "optimize ratio of onshore/offshore efforts on project."

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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The inclusion criteria for this IDC MarketScape consisted of two dimensions. The first was aggregate 2018 calendar year IT project-based services revenue of over \$800 million. Using the definitions detailed in *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019), IDC aggregated IT services revenue for over 420 services vendors that are tracked in IDC's Worldwide Semiannual Services Tracker to determine qualification. Second, the aggregate professional IT services revenue was segmented into the three macroregions of the Americas, EMEA, and Asia/Pacific. Vendors with over \$70 million of aggregate professional IT services revenue in each of the macroregions were invited to participate in this study.

## ADVICE FOR TECHNOLOGY BUYERS

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- **Consider how agile you must become.** While building and implementing cloud services are a significant task, equally significant is the change, post go-live, in the operating model for your business. Many end-user organizations we have spoken with struggle to keep pace with integrating the increased tempo of software releases from their cloud services providers. The journey to cloud reveals their own lack of business agility. Look for professional service providers that can also help you become more agile in your overall business and IT operations. At an IT level, this means ensuring you can conduct the integration and acceptance testing required when cloud service providers have multiple software releases each year. At a business level, this means deciding on which new innovations or increased functionality from your cloud service providers you want to activate.
- **Evaluate your ability to drive custom software-based innovation.** In the race to grow and innovate, companies are starting to develop more custom cloud-native code. While custom code may have looked endangered in a world of standardized cloud services, the fact that cloud services are increasingly commoditized pushes organizations to find other parts of their business where cloud-native code can help them differentiate. IDC believes all organizations must evaluate their ability to become a digital innovation factory. Specifically, this involves asking how to source custom code elements from various cloud ecosystems, how to develop new cloud-native code, and how to distribute this code directly to customers or indirectly to other consumers(see *Developers: Driving the Future of Digital Innovation*, IDC #US45723719, January 2020). Look for cloud professional service providers that can help you build your custom software-based capabilities as the foundation of your digital innovation factory.
- **Add new insights to your vendor selection process.** Use this IDC MarketScape as a tool not only to shortlist vendors for cloud professional services bids but also to evaluate vendors' proposals and oral presentations. For example, ask any of the vendors profiled how they are building on the strengths identified, and likewise, how they are addressing their challenges. Make sure you understand where these players are truly differentiated and take advantage of their expertise, industry based or otherwise. Tips about when to consider each provider are included in the profiles in the section that follows.

## VENDOR SUMMARY PROFILE

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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 the vendor's strengths and challenges. IDC's assessment includes 14 vendors (in alphabetical order): Accenture, Capgemini, Cisco, Deloitte, DXC, EY, HCL, Hewlett Packard Enterprise (HPE), Hitachi Vantara, IBM, NTT DATA, PwC, TCS, and Wipro.

### Accenture

According to IDC analysis and buyer perception, Accenture is positioned in the Leaders category in the IDC MarketScape for worldwide cloud professional services vendor assessment for 2020.

Accenture continues to invest heavily to mature its capabilities, but its strategy continues to focus on scaling and integrating its existing services, as well as developing new services, to adapt to buyers' preferences around industry-specific or horizontal cloud stacks. Most recently, Accenture launched its myNav platform to help clients navigate the cloud and select the right architecture and the right cloud solution to meet their specific business needs. myNav arrives at a recommended cloud solution by

helping discover and assess a client's existing infrastructure, application, and data landscape to recommend the most appropriate cloud architecture and solution based on strategic business needs.

Cloud services have become integral to offerings across Accenture and are positioned as key components across the business. Cloud focus areas include transformation, business/industry clouds, platforms, engineering, infrastructure, security, and the end-to-end migration to cloud capabilities across people, process, and technology. Accenture was an early mover implementing cloud services for its customers, starting almost 12 years ago, and that continues to benefit it today.

### **Strengths**

Buyers rate Accenture highly for its innovation capability, offering breadth, and prospects for the future. IDC notes Accenture's offering breadth around applications-centric platforms, its innovation capabilities, and its overall growth.

### **Challenges**

IDC believes Accenture's growth strategy could be enhanced by focusing even more than it does already on buyers outside of the IT organization.

### **Consider Accenture When**

You are looking for end-to-end cloud solutions that not only include innovative strategy and design but also the enablement of underlying cloud technology. Accenture with its strong industry knowledge and industry cloud offers and breadth of technology services that span from consulting all the way to managed services can fulfill cloud technology implementation needs at a global scale.

## **APPENDIX**

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### **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

The cloud professional services market includes elements from four of IDC's services foundation markets, which are defined in their entirety in *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019). Some examples of specific cloud professional services are shown in Figure 2.

FIGURE 2

### Examples of Cloud Professional Services



Source: IDC, 2020

## LEARN MORE

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### Related Research

- *Developers: Driving the Future of Digital Innovation* (IDC #US45723719, January 2020)
- *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019)
- *IDC MarketScape: Worldwide Cloud Professional Services 2018 Vendor Assessment* (IDC #US42545318, April 2018)

### Synopsis

This IDC study represents a vendor assessment of the 2020 worldwide cloud professional services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide cloud professional services market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing cloud professional services during both the short term and the long term.

"When buyers were asked what characteristics were required for a cloud professional services project to be successful at a worldwide level, the most frequently mentioned were 'provide an appropriate and high-quality team for the project' and 'project value delivered for fee paid,'" said Gard Little, research vice president, Global Services, Markets and Trends. "Conversely, the least frequently mentioned characteristics were 'leverage resources globally' and 'optimize the ratio of onshore/offshore efforts on project.'"

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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