

IDC MarketScape

IDC MarketScape: Canadian Cloud Professional Services 2021 Vendor Assessment

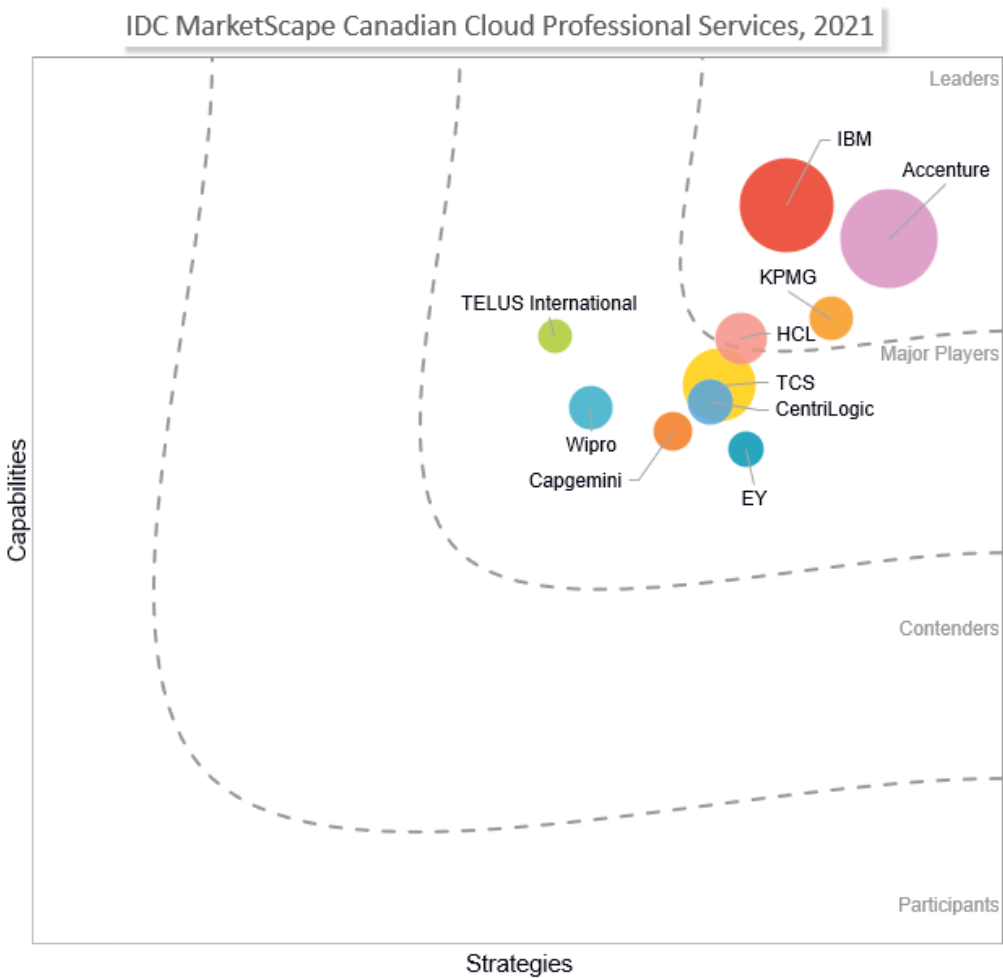
Jason Bremner

THIS IDC MARKETSCOPE EXCERPT FEATURES ACCENTURE

IDC MARKETSCOPE FIGURE

FIGURE 1

IDC MarketScape Canadian Cloud Professional Services Vendor Assessment



Source: IDC, 2021

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: Canadian Cloud Professional Services 2021 Vendor Assessment by Jason Bremner (Doc # CA46215320). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Advice for Technology Buyers, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study represents a vendor assessment of IT services firms providing cloud professional services in the Canadian market through the IDC MarketScape model. It covers a variety of vendors including global systems integrators and Canada-based firms. This research is a quantitative and qualitative assessment of many characteristics that buyers consider when selecting a cloud professional services provider. More Canadian organizations are adopting and expanding the use of cloud services than ever before to build infrastructures that support digital operations. A component of this evaluation is the inclusion of the perceptions of 294 IT buyers from organizations of both the key characteristics and the capabilities of the provider evaluated. The IT buyers were sampled from organizations with more than 100 employees across Canada and a cross section of industries in March 2020. Key findings from the evaluation include:

- Vendors are using similar strategies to grow their cloud practices. All are investing in employee development, increasing their consulting staff, and leveraging cloud-native technologies and methodologies. Many are expanding their capabilities via acquisition in Canada and globally. The resulting effect for IT buyers can be hard to distinguish between vendors when selecting a provider for a project. As such, IDC advises IT buyers to add new insights to your vendor selection process. Use this IDC MarketScape as a tool not only to short-list vendors that appear to meet your needs but also to investigate how a vendor is building on the strengths identified and how it is addressing its challenges.
- There are many vendors active in the cloud professional services space in Canada today. This IDC study assessed vendors that met the four inclusion criteria noted in the IDC MarketScape Vendor Inclusion Criteria section. However, there are many more vendors that IT buyers may wish to consider when procuring cloud professional services as an individual vendor may have the specific expertise required for the project. Some of them are listed in the Vendors to Watch section of this study. IDC advises IT buyers to balance their requirements for best-of-breed expertise and general expertise when selecting a cloud professional services provider. Having a clear cloud strategy and road map for digital transformation (DX) will help decision making on this issue.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The scope of this IDC MarketScape includes providers that offer project-based IT services that support clients' use of private and hybrid cloud computing environments and public cloud services, specifically infrastructure as a service (IaaS) and platform as a service (PaaS). IDC considered more than 35

vendors of such offerings in Canada to be included in this IDC MarketScape. For inclusion in this IDC MarketScape, the vendor had to meet four criteria:

- Should be listed as having official consulting and/or integration partner status in the online partner directory of one or more of the following public cloud service providers: Amazon Web Services (AWS), Microsoft Azure, Google Cloud Platform (GCP), and IBM Cloud.
- Have an active Canadian go-to-market presence for cloud professional services (i.e., project based).
- Earn more than C\$10 million in revenue annually from cloud professional services from Canadian clients.
- Have a minimum of 50 full-time, billable resources for cloud professional services located in Canada and serving Canadian clients.

ADVICE FOR TECHNOLOGY BUYERS

The year 2020 is history and its historical significance will be felt for many decades to come. The COVID-19 pandemic revealed that organizations that had moved early into digital transformation to deliver digital products and services or use digital processes fared much better in the economy than their peers that shifted slowly to digital. In the early days of the pandemic, IDC found that public cloud adoption had become mainstream after years of growing adoption. In March 2020, IDC surveyed Canadian organizations (with more than 100 employees) and found half of them had adopted PaaS and one-third of them had adopted IaaS. The pandemic drove new adoption of cloud services to ensure organizations' applications and data were accessible anytime and anywhere in a secure and scalable manner. In September 2020, IDC asked Canadian organizations how had their cloud strategy changed because of COVID-19 and found 35% of them were moving applications to the cloud for better security and reliability, 28% of them were investing in cloud data management for enhanced utility and insight, and 26% of them were using cloud as a platform for digital innovation.

While cloud adoption has steadily grown, cloud maturity among Canadian organizations has not kept pace. At the beginning of the pandemic, 52% of Canadian organizations with more than 100 employees were still in the two lowest levels of IDC's cloud maturity model, 26% had matured to the third level (out of a total of five levels), and 22% had achieved the highest two levels. Interestingly, since IDC started monitoring cloud maturity among Canadian organizations in 2014, 40-50% of Canadian organizations consistently aspired to reach the highest levels of cloud maturity in three years. However, they never achieved their aspirations. IDC believes major factors underlying this situation were internal cloud skills and technical debt of IT investments. Before the pandemic, IDC's research found that roughly one in three Canadian organizations with more than 500 employees had strong internal skills in assessing which workloads to move to the cloud, skills in migrating those workloads to the cloud, and managing those cloud workloads effectively. In addition, technical debt of refactoring or re-architecting enterprise workloads for cloud deployment often prevented organizations from moving to the cloud.

The COVID-19 pandemic revealed the need for a digital infrastructure that is the underlying platform for all IT and business automation initiatives. The emerging digital infrastructure ecosystem, increasingly built on a cloud foundation, focuses on ensuring ever faster delivery of innovative infrastructure hardware, software, resource abstraction, and process technologies to support the development and continual refinement of resilient digital services and digital experiences. Digital infrastructure includes the assets/resources that enable the shifting of applications and code for

enhancing customer experiences (CXs), embedding intelligence/automation into business operations, and supporting ongoing industry innovation at edge locations that link back to centralized datacenters owned by enterprises or cloud providers.

Because of the acceleration of cloud adoption, and the scarcity of strong, internal cloud skills among most organizations, IDC is seeing continued use of external professional service providers to augment internal skills as Canadian organizations move to the cloud. Among organizations that had adopted PaaS or IaaS as of March 2020, 67% of them had used cloud professional services within the previous 24 months. IDC believes the high rate of using external cloud consultants will continue in 2021 and beyond. To better inform sourcing decisions of services firms active in the cloud market in Canada, IDC has used its IDC MarketScape methodology to provide detailed insights of prospective suppliers to support our clients' sourcing decisions.

Determine Your Cloud Maturity

Given the acceleration in cloud adoption and broader usage, and the level of cloud maturity among Canadian organizations, IDC recommends that organizations determine their cloud maturity and their digital strategy, and supporting cloud strategy, when evaluating cloud professional services firms. What skills do you have, and what do you need to execute your strategy? Organizations that have yet to move to the cloud can still be successful and accelerate their journey by learning from pitfalls experienced by early adopters. Organizations that have stalled in their maturity can jump-start their journeys by focusing on the obstacles to cloud maturity – and select the right professional services provider to assist them in overcoming those obstacles.

IDC uses a five-level maturity model (called an IDC MaturityScape) to represent the progression an organization goes through in terms of adopting and mastering a technology or process. The IDC MaturityScape for cloud aims to assist organizations in realistically appraising their current capabilities, articulating reasonable short- and long-term goals, identifying their gaps, and beginning an action plan for change. The IDC MaturityScape for cloud outlines cloud computing across five stages, from ad hoc to optimized. In summary, the key characteristics of each stage are:

- **Ad hoc (exploratory clouds):** Individual development and line-of-business (LOB) teams experiment with cloud. Shadow IT reigns supreme with inconsistent approaches to security, information management, and governance.
- **Opportunistic (collaborative standardization):** Cloud leaders begin to collaborate and learn from one another, formalize best practices, and develop frameworks for implementing enterprise-scale hybrid multicloud architectures.
- **Repeatable (agility unleashed):** More consistent and standardized availability of automated cloud resources and services enable developers and LOB teams to execute more rapidly and cost effectively.
- **Managed (industrial clouds):** Mission-critical workloads and applications are increasingly implemented using cloud platforms and services. Workload portability increases while end users enjoy consistent experiences across applications.
- **Optimized (innovation and transformation):** Organizations' cloud strategies and policies are consistently defined and implemented, resulting in more robust and flexible IT availability and lower costs and risks.

As organizations progress up the maturity scale, they should address the four critical dimensions that lead to successful progression. IDC believes that failure to satisfactorily address all four dimensions is

why many Canadian organizations have seen their cloud maturity stall. Selecting the right cloud professional services provider can help pinpoint the obstacles to overcome and accelerate your journey. The four critical dimensions are:

- **Vision:** This dimension considers the importance of cloud strategy, leadership, and risk management as organizations transition to a cloud-first approach that serves the business. This requires a long-term view and understanding of an organization and its objectives, opportunities, and challenges; this includes executive sponsorship and organizational responsibility for control of spending.
- **Technology:** This dimension describes how organizations should mature their approach to IT infrastructure, security, and IT automation to ensure increasing value from cloud investments.
- **People:** This dimension includes skills and training and self-service empowerment in the entire organization, not just IT. Importantly for cloud, this dimension also includes competencies in partner and vendor governance.
- **Process:** This dimension defines the evolution of controls/governance, data/information management, and cloud service provider contract management as they become more institutionalized and automated with increasing maturity in cloud adoption.

Working with the right professional service provider can help identify specific obstacles and remedy them through specific actions or decisions based on the provider's experience with other clients. For example, the provider can help identify how cloud impacts your organization's operating model, devise a manageable sequence to migrate applications or workloads to the cloud, determine the impact on security and compliance from the cloud investment, or help establish a cloud center of excellence to bring internal expertise together.

Future of Cloud Is Hybrid

As digital infrastructure becomes a driving force that shapes IT investments, organizations are reminded that the shift to cloud will encompass a hybrid cloud model based on experiences of early adopters and product road maps of leading vendors. The concept of distributed cloud computing is becoming more real in the form of products from a majority of public cloud providers. They are making it easier to migrate workloads from one cloud deployment model to another. In addition, IT budget intentions of Canadian organizations are planning for different cloud deployments for years to come. In 2020, 20% of Canadian IT budgets were allocated to public cloud deployments, 14% of budgets were allocated to in-house private cloud, and 13% of budgets were allocated to hosted private cloud. In 2022, 29% of budgets will be allocated to public cloud deployments, 13% to in-house private cloud, and 15% to hosted private cloud deployments. The budget intentions reinforce that Canadian organizations recognize the future of cloud is hybrid.

Since the future of cloud will be hybrid cloud for most organizations, IDC advises buyers to consider the hybrid cloud capabilities of professional services firms they are evaluating. Furthermore, this advice extends to the professional service firm's capabilities around multiple cloud technology stacks such as AWS, Microsoft Azure, Google Cloud, IBM Cloud, and VMware.

Size Is Important But Bigger Is Not Necessarily Better

This IDC MarketScape examined a broad range of providers addressing the cloud professional services needs of enterprise customers. IDC could have assessed many more providers as there are many firms in Canada providing cloud professional services, but they did not meet our revenue and employee size thresholds to be included. IDC interviews with the vendors and IT buyers indicate many

of those vendors have strong capabilities. IDC advises prospective customers to prioritize their requirements and consider several (or more) of the providers of varying sizes able to meet their requirements in terms of service delivery, ability to grow with you, relationship management, and cost constraints. Find the right provider that fits your requirements and culture. See the Vendors to Watch section in this IDC study for a list of additional vendors to consider when procuring cloud professional services.

Apply Governance Framework from IT Outsourcing to Cloud Projects

The gap between traditional consulting and integration projects and ongoing managed service engagements is narrower in cloud services than in the past. A key reason for this is the nature of the cloud technology being delivered as a service on an ongoing basis. As a result, cloud services have similar look and feel as traditional IT managed services. Many organizations do not have a comprehensive cloud strategy and thus grapple with migrating to the cloud – as evidenced by the slow growth in cloud maturity. Organizations that have developed a capability to govern external technology service providers (e.g., IT outsourcers) may be better equipped in preparing to work with cloud professional services providers because they have an understanding of how to work with and leverage the abilities of IT outsourcers. For example, IDC has seen many vendor management teams develop dispute resolution mechanisms for large service contracts and others conduct regular, comprehensive vendor portfolio assessments – both practices that are useful in managing successful, long-term vendor relationships. IDC believes organizations can leverage their experiences from IT outsourcing – or learn from their peers – to apply vendor governance frameworks to cloud projects to ensure maximum business value gained during or after cloud projects are complete.

Become a Cloud-Native Enterprise

As enterprises encounter increased demands to digitize both their products and operational processes, they will find it necessary to become primarily producers of software as opposed to consumers of off-the-shelf, packaged software. This transition from being primarily consumers of software to producers of software will require enterprises to make a multitude of cultural, operational, and technical changes to have the capacity to produce software on the scale required to remain competitive with their peers. Furthermore:

- **Implement PaaS development tools.** Implementing PaaS is a key component of an enterprise's transition to cloud-native development because it provides developers with an integrated platform of infrastructure and software-related components to develop digital solutions. PaaS guides the decision-making process made by developers about the selection of development stacks, as well as compatible tools and services. PaaS also provides developers with self-service access to infrastructure and developer tools.
- **Cultivate developer familiarity with cloud-native technologies.** The second step for enterprises to become cloud native involves cultivating developer familiarity with microservices, containers, container orchestration frameworks, and other cloud-native technologies. Greater familiarity with these technologies will accelerate cloud maturity and help build cloud-native mission-critical applications.
- **Implement DevOps.** IDC research found that 30% of Canadian organizations with more than 500 employees had implemented DevOps in 2020, and 35% of them are planning to implement by 2022. This is an important step because cloud-native development requires the automation of processes for provisioning hardware, scaling an application, integrating code changes made by multiple team members into a single codeset, and deploying an application

to production. DevOps accelerated developer velocity by automating processes that would otherwise need to be executed manually. This greatly impedes working at cloud speed.

- **Cultivate a developer-centric culture.** Cloud-native enterprises are agile and fast because they leverage more people and expertise than traditional application development practices do. Cloud-native enterprises use part-time developers (e.g., data scientists, business analysts, project managers, and other line-of-business staff) to focus on developing software solutions using low-code and no-code developer tools. Part-time developers are encouraged to participate and benefit from oversight and support from the professional development team.

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 challenges. IDC's assessment includes 10 vendors (in alphabetical order): Accenture, Capgemini, CentriLogic, EY, HCL, IBM, KPMG, TCS, TELUS International, and Wipro.

Accenture

Accenture is positioned in the Leaders category in the 2021 IDC MarketScape for Canadian cloud professional services providers.

Accenture is one of the largest IT and business services firms in Canada, with more than 5,000 employees. Based on IDC's analysis, IT services accounts for approximately 60% of Accenture's revenue and business services accounts for 40%. Managed services represents approximately 52% of its revenue and project-based services represents 48%. Accenture has 12 offices in Vancouver, Calgary, Edmonton, Ottawa, Toronto, Montreal, Fredericton, and the Niagara region. Several of the locations are Canadian delivery centers and part of Accenture's global delivery center network. Also, in Toronto is the Canada Innovation Hub, which is part of a global network of hubs. Accenture serves clients in more than 40 industries in five groups: Communications, Media, & Technology; Financial Services; Products; Resources; and Health & Public Service. The Canadian capabilities of Accenture's Avanade subsidiary is included in this profile even though the subsidiary works somewhat independently.

Accenture Canada has embarked on an aggressive growth strategy to double its revenue by 2025 – a strategy driven by cloud technologies and services. Accenture Canada will leverage the US\$3 billion investment that Accenture is making globally over the next three years to enable clients to become cloud-first businesses. Similar to its overall business of providing project-based and managed services, Accenture's cloud strategy involves professional and managed services, such that it helps clients make the migration to the cloud and aids clients' ability to manage and optimize their use of cloud technologies to advance their digital transformation. Accenture has organized its cloud professional services into several business groups aligned to technology partners: Accenture Microsoft Business Group (includes Avanade), Accenture AWS Business Group, Accenture Google Business Group, ServiceNow Business Group, and Accenture Pivotal Business Group (includes VMware).

Accenture brings deep capabilities to the Canadian market in terms of personnel, investments, and solutions. Globally, Accenture has more than 100,000 professionals delivering cloud services, including more than 37,000 Microsoft Azure-certified professionals, more than 10,000 AWS-certified professionals, and more than 2,300 GCP-certified professionals. Accenture has more than 900

employees in Canada delivering cloud professional services. Accenture delivers services using a multitier model (on premises, within city from Accenture's offices, Canadian delivery centers, and more than 60 Advanced Technology Centers). The delivery center network provides Canadian clients flexibility to source cloud professional services with industry specialization, specific technology skills, time zone coverage, security compliance, and language specialization – including French-speaking teams in Canada, France, Morocco, and Mauritius. It is also certified in many global quality standards including People CMM Level 5, CMMI-DEV Level 5, SSAE16/ISAE3402 Type II, ISO 27001, ISO 14001, ISO 20000, and BS25999.

In general, and also in cloud professional services, Accenture differentiates itself on its industry expertise, technology skills, and strong partnerships with prominent technology players. In addition, IDC sees Accenture differentiating itself in cloud professional services with its investments in a variety of proprietary solutions to accelerate clients' cloud journeys. The Accenture Cloud Platform (ACP) is an integrated, multicloud management toolset that enables monitoring of infrastructure, applications, and microservices; automation of cloud operations; and management of cloud consumption to optimize usage and cost. The latest version of ACP supports multicloud, hybrid cloud, containers, and serverless. The Accenture myNav solution performs in-depth discovery of a client's application and infrastructure environment as input data to design suitable cloud deployment models and run AI-driven simulations to determine optimal solutions to meet the client's technical, security, and cost requirements. Accenture myWizard is an intelligent automation platform that brings together AI-driven automation and technology assets to remediate and automate cloud application development, and it is the foundation for Accenture's IT managed service capabilities.

Linking the client's journey to become a cloud-first business to enable, accelerate, and sustain digital transformation is core to Accenture's positioning in cloud professional services. This positioning allows Accenture to bring its end-to-end service capability, solutions, and expertise to bear for the client from business and IT strategy, assessment, design, and ongoing management. Accenture's value proposition is predicated on the client's transformation and the benefits afforded by cloud. For customers willing to engage with Accenture in a long-term managed service engagement, Accenture will invest in designing and building the cloud environment for the client and commit to lower current spending levels.

Strengths

Accenture's strategy for cloud professional services is aligned to customer needs in terms of helping them digitally transform their business using cloud services in a cost-effective manner. Accenture's three-tier global delivery model and pricing flexibility offer value for money to clients for the cloud transformation investments. Its service delivery and employee strategies ensure consistent quality of service for clients. And it looks to expand its service portfolio and capabilities into emerging technologies to maintain its ability to meet changing client requirements.

From a capabilities perspective, clients have a high level of satisfaction with Accenture, including in its ability to integrate with client teams and overall delivery strength. Its offerings provide numerous benefits because of the breadth of functionality and its investment in innovation centers, intellectual property, and employee development that results in a high level of service quality.

Challenges

Accenture's primary challenge is market perceptions on several attributes important to prospective clients for cloud professional services. Despite Accenture having a large presence in Canada, general

market awareness of its presence is lower than expected, which may reflect Accenture's focus on very large organizations in key industries, and its offerings being in major cities. In addition, there is a market perception of Accenture as being premium priced. Finally, some clients perceive Accenture as challenged with its ability to meet project timelines and accommodate changes in project scope.

Consider Accenture When

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 a breadth of technology services that span from consulting all the way to managed services and can fulfill cloud technology implementation needs at a global scale.

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

Cloud professional services are primarily project-based services that assist customers with planning and implementing a cloud services strategy, which involves deciding how to adopt the use of public clouds, deciding how to build and implement private clouds, or deciding how to use a hybrid of public and private clouds.

Cloud professional services may include assessments and road map development, workshops and accelerators, implementation of pilot programs or other deployments, and proofs of concept. These solution services may also include assistance in implementation or adoption of cloud services such as SaaS, IaaS, or PaaS as well as the integration of these services into the customer's IT environment (whether cloud related or noncloud related).

Note: For this IDC study, only project-based services for PaaS and IaaS are considered for vendor assessments.

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, 2021

LEARN MORE

Related Research

- *IDC MarketScape: Canada Salesforce Implementation Services 2020 Vendor Assessment* (IDC #CA46257720, December 2020)
- *Future of Digital Infrastructure: Ever Faster Delivery of Reliable Digital Services and Experiences* (IDC #US46807920, September 2020)

- *The Path Toward a Cloud-Native Enterprise: PaaS, Cloud-Native Technologies, DevOps, and Developer Centricity* (IDC #US46538720, June 2020)
- *Governing Vendors for Transformation: Getting the Most from Third-Party Relationships* (IDC #US46141620, April 2020)
- *IDC MarketScape: Canadian Datacenter Operations and Management Services 2019 Vendor Assessment* (IDC #CA44463419, April 2019)
- *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019)
- *Cloud Success: Migrate with a Plan to Mature* (IDC #US44883619, March 2019)
- *IDC MaturityScape Benchmark: Cloud Worldwide, 2017* (IDC #US41925016, November 2016)

Synopsis

This IDC study represents a vendor assessment of the Canadian cloud professional services market through the IDC MarketScape model. This IDC study covers a variety of vendors including global systems integrators and Canada-based firms. The research is a quantitative and qualitative assessment of many characteristics that buyers consider when selecting a cloud professional services provider. This evaluation is based on a comprehensive set of parameters important to meeting the customer's current and future needs for cloud projects involving PaaS and IaaS. This IDC MarketScape covers 10 vendors participating in the Canadian cloud professional services market.

"More Canadian organizations are adopting and expanding their use of cloud services than ever before as they race to build digital infrastructures to prepare for the post-pandemic recovery. Canadian organizations are working with cloud professional services firms to accelerate their cloud maturity and augment their in-house capabilities. IDC expects this trend to continue as the shift to cloud becomes more imperative and the complexities to build automated and intelligent, hybrid, multicloud digital infrastructures become greater," says Jason Bremner, research vice president, Industry and Business Solutions.

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 Canada

33 Yonge St., Suite 902
Toronto, Ontario Canada, M5E 1G4
Twitter: @IDC
idc-community.com
www.idc.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 2021 IDC. Reproduction is forbidden unless authorized. All rights reserved.

