COMPETITIVE ANALYSIS

IDC MarketScape: Worldwide Cloud Professional Services 2013 Vendor Analysis

Gard Little   Chad Huston
Rebecca Segal

IDC OPINION

This IDC study represents a vendor assessment of the 2013 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. A significant and unique component of this evaluation is the inclusion of the perception of cloud professional services buyers of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC's macroregions. Key findings from the buyers' feedback include:

☑ When analyzing all providers that participated, across all eight capabilities evaluated, "functionality or offering road map" received the highest aggregate scores. Alternatively, "employee strategy" received the lowest aggregate scores.

☑ Within the category "functionality or offering road map," the subcategory "provide technical insights and competence" received the highest aggregate scores for any subcategory in the evaluation. The lowest aggregate score for any subcategory went to "manage vendor staff turnover during a project's lifetime," which was a component of the "employee strategy" category.

☑ Worldwide, and in the Americas, the number 1 business priority for buyers of cloud professional services was to "create a more effective business." In Asia/Pacific, "comply with new or existing regulations" topped the list of business priorities, whereas in EMEA, "improve operational efficiency" ranked number 1.

☑ When buyers were asked what characteristics were required for a cloud professional services project to be successful, at a worldwide level, the number 1 characteristic was "meet the project timeline." Interestingly, it was not the number 1 answer for any of IDC's three macroregions. For buyers in the Americas, the number 1 response was "deliver innovation for your solution," whereas in Asia/Pacific, "provide technical insights and competence" led, and in EMEA, "integrate project team with my company" topped the list.

IN THIS STUDY

This IDC study represents a vendor assessment of the 2013 cloud professional services market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that define success in today's cloud professional services market.

This IDC MarketScape covers a variety of vendors participating in the worldwide cloud professional services market. The evaluation is based on a comprehensive and rigorous framework that assesses each vendor relative to the criteria and to one another. The framework highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

This study is made up of two sections: The first part involves a definition of the characteristics that IDC believes lead to success in the cloud professional services space. These characteristics are based on executive interviews of both buyers and vendors of cloud professional services as well as key analyst observations and assessments of best practices. The second part of this study provides a visual presentation of selected vendor positioning in the cloud professional services market. The spatial format is an easy-to-read bubble chart. This format concisely exhibits the observed and quantified scores of the vendors that were assessed for this IDC MarketScape.

This document concludes with IDC's essential guidance to both vendors and buyers of cloud professional services. The guidance is designed to provide insight for continued growth and improvement of cloud professional services offerings.

Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and select 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 a review board 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.

Note: All numbers in this document may not be exact due to rounding.

SITUATION OVERVIEW

Introduction

With an estimated market size of $9.6 billion in 2013, and a forecast five-year CAGR of 24.8%, cloud professional services represent both one of the largest and fastest-

growing submarkets under the entire worldwide services umbrella. This document seeks to provide an analysis of the vendors that participate in this market by scoring them on three separate dimensions, their current capabilities, their strategy for the future, and their current market share.

Services Definitions

What Are "Cloud Services?"

As defined in *IDC's Worldwide IT Cloud Services Taxonomy, 2012* (IDC #233396, March 2012), cloud services are fundamentally about an alternative solution composition, delivery, and consumption model — one that can be applied to IT industry offerings but also, much more broadly, to offerings from many other industries, including entertainment, energy, financial services, health, manufacturing, retail, and transportation as well as the government and education sectors.

The cloud model goes well beyond prior online delivery approaches — combining efficient use of multitenant (shared) resources, radically simplified "solution" packaging, self-service provisioning, highly elastic and granular scaling, flexible pricing, and broad leverage of Internet-standard technologies — to make offerings dramatically easier and generally cheaper to consume. At a high — and overly simplistic — level, cloud services can be described simply and informally as:

> Consumer and business products, services, and solutions delivered and consumed in real time over a network (most often, the Internet)

But this simple description is not sufficient to describe and capture the unique value that the cloud model brings and how it differs from traditional on-demand services and online services. For a detailed definition, see *IDC's Worldwide IT Cloud Services Taxonomy, 2012* (IDC #233396, March 2012).
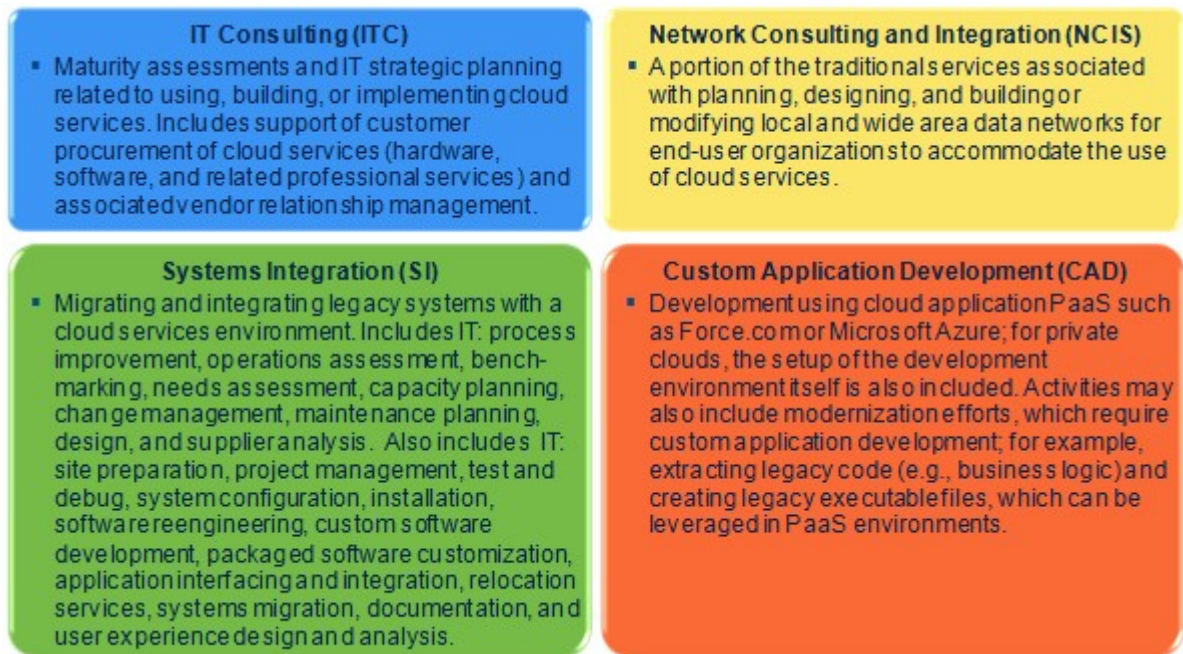
What Are Cloud Professional Services?

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 to build and implement private clouds, or deciding to use a hybrid of public and private clouds.

Cloud professional services may include such services as assessments and road map development, workshops and accelerators, implementation of pilot programs or other deployments, and proof of concepts. It may also include assistance in implementation or adoption of cloud services such as software as a service (SaaS), infrastructure as a service (IaaS), or platform as a service (PaaS) as well as the integration of these services into the customer's IT environment (whether cloud related or non–cloud related). Customer spending for cloud professional services is a subset of spending for the following project-based markets, as illustrated in Figure 1.

Examples of Cloud Professional Services

IT Consulting (ITC)
- Maturity assessments and IT strategic planning related to using, building, or implementing cloud services. Includes support of customer procurement of cloud services (hardware, software, and related professional services) and associated vendor relationship management.

Network Consulting and Integration (NCIS)
- A portion of the traditional services associated with planning, designing, and building or modifying local and wide area data networks for end-user organizations to accommodate the use of cloud services.

Systems Integration (SI)
- Migrating and integrating legacy systems with a cloud services environment. Includes IT: process improvement, operations assessment, benchmarking, needs assessment, capacity planning, change management, maintenance planning, design, and supplier analysis. Also includes IT: site preparation, project management, test and debug, system configuration, installation, software reengineering, custom software development, packaged software customization, application interfacing and integration, relocation services, systems migration, documentation, and user experience design and analysis.

Custom Application Development (CAD)
- Development using cloud application PaaS such as Force.com or Microsoft Azure; for private clouds, the setup of the development environment itself is also included. Activities may also include modernization efforts, which require custom application development; for example, extracting legacy code (e.g., business logic) and creating legacy executable files, which can be leveraged in PaaS environments.

Source: IDC, 2013

IT Consulting

IT consulting is a professional services activity around information technology. It is the delivery of advice to customers aimed at managing their IT organization and at improving an organization's IT performance, infrastructure including IT security, and related processes.

IT consulting includes two main areas:

☑ **IT strategy consulting** assists an organization with designing an IT vision and goals for the entire organization and then aligning resources accordingly. This includes IT strategic planning (including human resources [HR], facilities, and financial planning), IT needs assessment, IT operations assessment, development of enterprise architectures, IT road map design, IT governance (including definition of IT processes), and IT strategies related to systems, enterprise applications, capacity planning, maintenance planning, and infrastructure.

☑ **IT operations consulting** assists an organization with optimizing its IT infrastructure and architecture and its use of specific technologies. This includes infrastructure management; IT road map implementation; IT supplier analysis and hardware, software, and services procurement; vendor relationship management; IT infrastructure performance and performance engineering; IT process improvement; IT benchmarking; and IT change management.

IT consulting excludes all of the consulting activities defined under network consulting and integration services (NCIS).

Systems Integration

IDC defines systems integration (SI) as a process that includes the planning, design, implementation, and project management of a technical solution that addresses an organization's specific technical or business needs. When SI deals involve contracting for custom application development (CAD) related to the systems integration, then those activities are included in the definition of SI.

SI projects typically involve different platforms and technologies. The solution may include hardware, software, and services and is consumed on-premise, on demand, or in a cloud-based environment. An SI project is formalized by a contract that is constructed around solution specifications and often demands certain levels of performance against technical or business goals. The end result of an SI project is the delivery of a system that meets a stated objective and fulfills solution specifications.

SI projects can include implementation or integration of any categories of software listed in *IDC's Software Taxonomy, 2013* (IDC #241527, June 2013), including the following (consumed on-premise or as software as a service):

- **Enterprise resource management applications** include applications for financial accounting, human capital management, payroll accounting, procurement order management, financial performance and strategy management, project and portfolio management (PPM), and enterprise asset management.

- **Supply chain management applications** include applications for logistics, production planning, and inventory management.

- **Customer relationship management applications** include applications for sales, marketing, customer service, and contact centers.

- **Other applications** include the following:

  - Collaborative applications such as email, instant communications, team collaboration, conferencing, and enterprise social software

  - Content applications such as content management, authoring and publishing software, search and discovery, and enterprise portals

  - Operations and manufacturing applications (OMA) such as services operations management and related back-office functions

  - Engineering applications such as mechanical computer-aided drawing (CAD), computer-aided engineering (CAE), computer-aided manufacturing (CAM), collaborative product data management; and other engineering functions

The development of custom applications that are not part of the systems integration deals are excluded because those activities are included in the definition of the custom application development foundation market. In addition, systems integration excludes all of the integration activities defined under network consulting and integration services.

Network Consulting and Integration

Network consulting and integration services are defined as those activities associated with planning, designing, and building local and wide area data networks (commonly known as LANs and WANs), including multiservice, converged wireless, and wireline networks that allow voice, video, and data applications (such as VoIP and unified messaging) to be propagated across a single, common infrastructure.

Specifically, the NCIS market includes services provided to telecommunications network access and transport providers for the planning and building of the public integrated voice, data, and video network infrastructures. These services will be presented as a separate line item within the NCIS market size and forecast.

Exceptions and Exclusions

Excluded from this definition are services provided for the planning, building, or operations of traditional circuit-switched enterprise voice networks and their supporting devices (e.g., traditional PBXs).

Custom Application Development

Custom application development services focus on delivering standalone, custom codesets to meet a client's business needs. CAD services can span the entire application development life cycle, including requirements gathering and design, solution build, testing and QA, and solution acceptance. CAD services include coding for custom-developed applications as well as enhancements and modifications to custom legacy applications. CAD services also include third-party development and support (e.g., follow-on patches or enhancements) of custom applications that are either designed or migrated to cloud-based platforms such as Windows Azure or Force.com. Because of the complexity and evolving maturity of platform-as-a-service platforms, and the ongoing need to integrate with internal back-end systems, discrete CAD or SI services are being delivered to enterprises to support their PaaS initiatives, which can include coding, construction, and integration support as well as process modeling and system architectural design. IDC notes that CAD contracts can include requirements for patches that are not considered part of a daily maintenance plan. Customization of an existing custom application is also included within CAD (customization is defined as implementing new features not available in the custom software application). CAD services are delivered as part of a project with a defined beginning and end.

Although application development activities can be included in larger systems integration projects, IDC classifies services as CAD if the final deliverable to a client is a custom-designed application.

Maintenance contracts that include 24 x 7 ongoing support and maintenance for custom applications by maintaining the code and providing bug fixes and enhancements on a continual basis are captured within other markets (e.g., application management [AM]). This definition also excludes support for standard packaged applications, which is captured either in the software deploy and support definition or in the IT education and training definition.

Application development that is performed as part of a broader SI, application management, or IS outsourcing engagement is also not included in the custom application development segment.

IDC MarketScape Vendor Inclusion Criteria

The inclusion criteria for this IDC MarketScape consisted of two dimensions. The first was aggregate 2012 calendar year professional IT services revenue. Using the definitions detailed in the Services Definitions section, IDC analysts calculated the aggregate IT consulting, systems integration, network consulting and integration, and custom application development revenue for all 53 services vendors that are tracked in IDC's Worldwide Quarterly Services Tracker. Second, the aggregate professional IT services revenue was granulated into the three macroregions of the Americas, EMEA, and Asia/Pacific. Vendors with over $90 million of aggregate professional IT services revenue in each of the macroregions were invited to participate in this study. These criteria resulted in a list of 22 vendors.

IDC analysts also determined the top 5 cloud professional services vendors by ranking the calendar year 2012 revenue for those vendors that met the inclusion criteria detailed previously. In alphabetical order, these vendors are Accenture, Capgemini, CSC, Fujitsu, and HP. Participation in this study for these vendors was considered involuntary, so their inclusion in this study was not determined upon their willingness to provide information. For those 17 vendors that met the criteria, but were not determined to be top 5 in revenue, invitations were sent and inclusion in this survey was based upon their willingness to provide information.

Market Strategies

The sections that follow provide a basic framework of the cloud professional services market by summarizing the findings from two recent IDC surveys.

Cloud Professional Services Survey Findings

The first survey (see *2013 U.S. Professional Services Opportunities Related to Cloud Services,* IDC #239862, March 2013) showed that the systems integration foundation market had the highest number of responses to the question, "In 2012, what was the primary professional service consumed for cloud?" Figure 2 details the response rate for all four of the professional IT services markets. Seeing systems integration with the highest response rate is hardly surprising, as the largest effort in discrete cloud professional services engagements often consist of the actual implementation. The amount of effort required is only followed closely by the planning and design portion,

for which IT consulting represents at 17.6% of respondents. Application development is slightly behind at 15.2% of respondents, followed by the network consulting and integration market with the least amount of respondents.

What is surprising about these results is the relatively small range between the foundation market with the highest number of respondents compared with the lowest. For example, in Figure 2, systems integration is the primary cloud professional service consumed in 18.5% engagements, with network consulting and integration coming in the lowest at 11.4%. This gives a range of 7.1% between the highest and lowest markets in terms of primary cloud professional service consumed. Comparing this with the other four pillar technologies, enterprise mobility services had a range of 11.4% between the market with the highest number of primary professional services, IT consulting at 23.4%, and the lowest, systems integration at 12.4%. Another interesting comparison is the relatively higher average of respondents who had consumed cloud professional services. The average across all four foundation markets in Figure 2 is 15.7%. Compared with the average of 13.5% in business analytics and 10% in enterprise social technologies, cloud professional services was second only to enterprise mobility technologies at an average response rate for the amount of primary services consumed at 16.4%.

FIGURE 2

Primary Project-Based Service Consumed for Cloud

Q. In 2012, what was the primary professional service consumed for cloud?
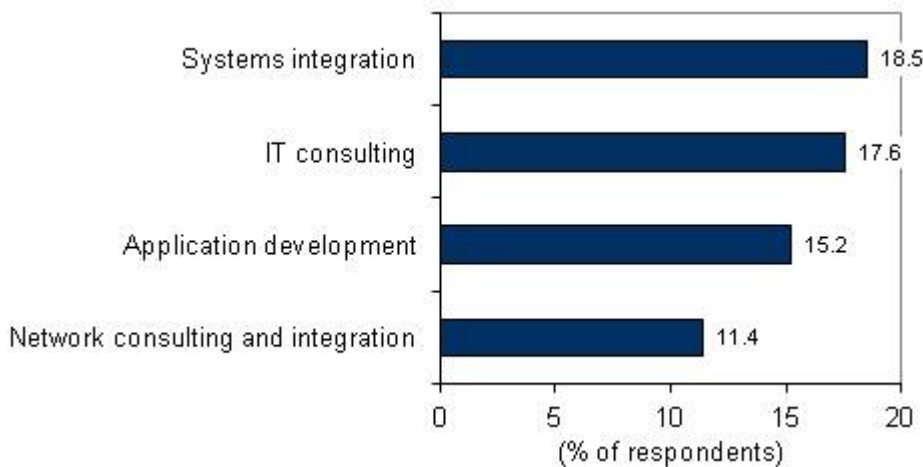
n = 421

Source: IDC's *Cloud Professional Services Survey,* 2013
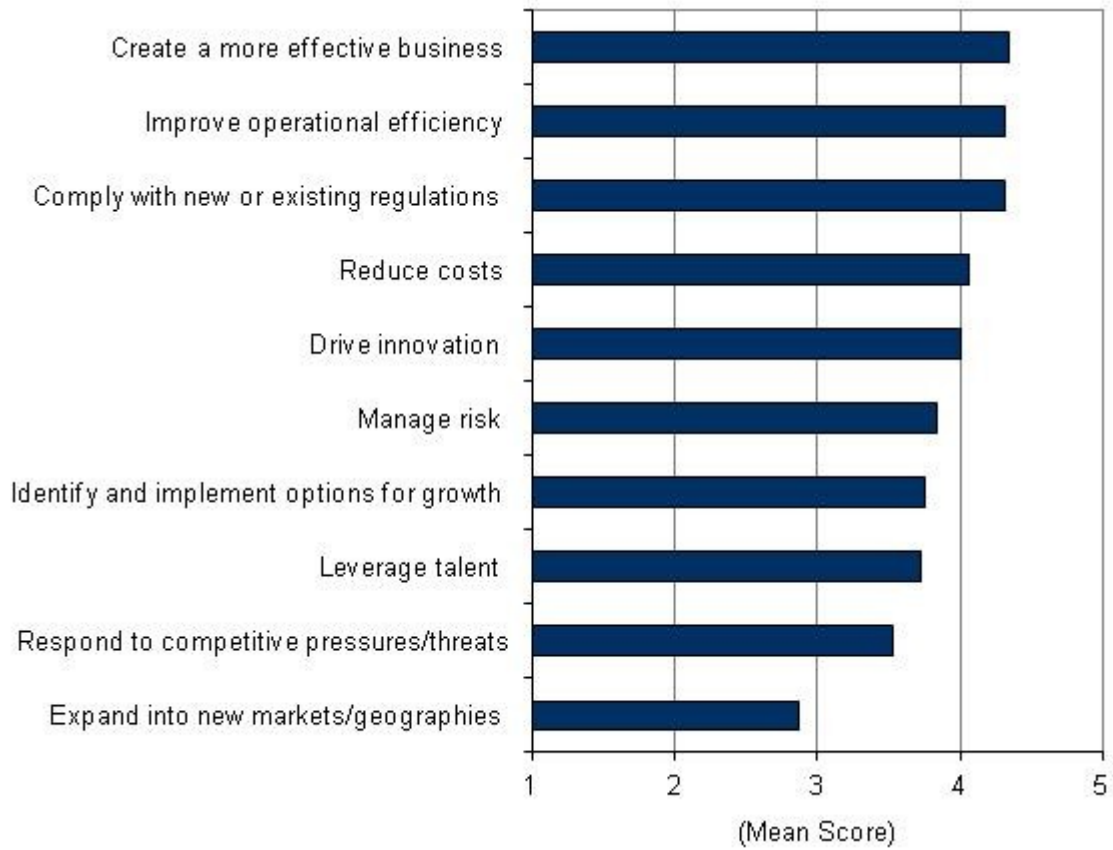
Buyer Perception Survey Findings

The second survey to examine is IDC's *Global Cloud Professional Services Buyer Perception Survey.* This survey was performed in tandem with the vendor perception survey that influenced the majority of the capabilities axis in IDC MarketScape Figure 5. This survey focused on two major areas: the first being which business priority is most important to the given company. The results of this portion of the survey are detailed in Figure 3. The second area of this survey involved determining which characteristics a vendor believes a cloud professional services vendor must hold for a project to be successful. The results of this portion of the survey are detailed in Figure 4.

The business drivers listed in Figure 3 make it clear that buyers of discrete cloud professional services are looking for vendors that can improve their operation efficiency, not just lower IT costs. This is evident not only from both the top 2 responses, "create a more effective business" and "improve operation efficiency," but also from some of the responses which scored the lowest. "Expand into new markets/geographies," "respond to competitive pressures/threats," "leverage talent," and "identify and implement options for growth" were the lowest scoring responses. These responses indicate that integrating a cloud professional services solution with a buyers business strategy is not the top priority. Buyers want vendors that can use their domain knowledge, technology expertise, and intellectual property to reduce cost and increase efficiency from day one.

Figure 4 details those characteristics which buyers of cloud professional services deem most important in order for an engagement to be successful. As expected, the ability to finish on time and flexibility to handle scope changes are the number 1 and number 2 responses, respectively. Regardless of the disruptive effects cloud has had upon the traditional professional services model, buyers will most likely still always look for vendors that can do a project on time and handle changes in scope quickly. What is interesting are the lower scoring responses, "leverage resources globally" and "optimizes onshore/offshore efforts on a project." IDC believes these factors are not truly the least important factors to buyers, but that the importance of "project value delivered for the fee paid" (number 4 response) is built into the customers' expectations, and thus the means (i.e., properly leveraging offshore resources) of contract delivery are not important as long as expectations are properly met.

FIGURE 3

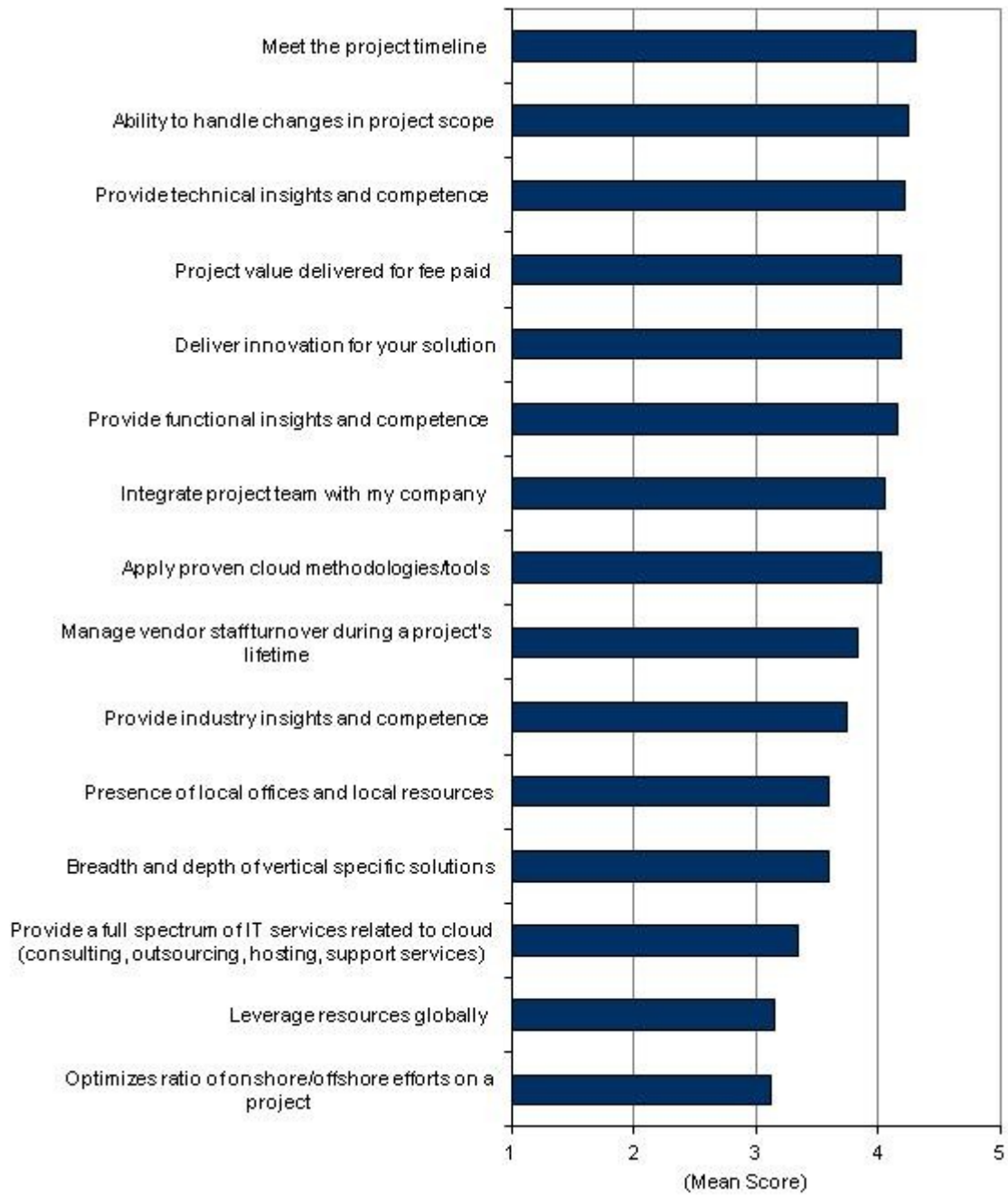Business Drivers for Cloud Professional Services Projects

n = 32

Note: Mean scores are based on a scale of 1–5, where 1 = not at all important and 5 = extremely important.

Source: IDC's *Global Cloud Consulting Buyer Perception Survey,* 2013

FIGURE 4

Important Factors for a Successful Cloud Professional Services Project

n = 32

Note: Mean scores are based on a scale of 1–5, where 1 = not at all important and 5 = extremely important.

Source: IDC's *Global Cloud Consulting Buyer Perception Survey,* 2013

Weighting Evaluation Criteria

This section includes an introduction of market-specific weighting definitions and weighting values. Scoring in the IDC MarketScape methodology consists of continually more granular segmentations of scoring. To explain most succinctly and sufficiently, each level of granularity is explained in this section.

The first segmentation of scoring is the strategies versus capabilities criteria. In its most simple terms, strategies represents IDC's opinion on the future success of a vendor, while the capabilities represents IDC's opinion on a vendor's current capability. These two subsegments are weighted as follows: 60% for strategies and 40% for capabilities, and represent the x- and y-axis in Figure 5 (the IDC MarketScape Worldwide Professional Services Market Vendor Assessment section provides more detail regarding scoring). IDC believes the emerging services nature of cloud professional services requires a slight weighting toward strategies compared with capabilities, although both remain critical to overall vendor success in the market.

Both the strategies and the capabilities segments are further segmented into three criteria segments, they are offering, go to market, and business. Similar to the weightings for the parent segments, these subsegments are not weighted equally. For the strategies segment, business strategy is weighted most heavily, followed by go-to-market strategy and finally offering strategy. The reasoning behind this weighting is that when scoring a vendor's future potential, IDC is less concerned about the current offerings and more concerned about a vendor's plans for growth, innovation, and employee retention. When scoring a vendor's current capabilities, current offering capabilities are weighted most heavily, followed by go-to-market capabilities, and finally business capabilities. Again, the reasoning is that when scoring the current state of a vendor's business, its current offerings have the most influence.

The last piece of granularity is detailed in Tables 1 and 2. Within these tables, the topic for each subcriteria is detailed alongside the IDC defined criteria for success. These subsegments are not weighted evenly, the criteria weighing column provides insight as to which subcriteria is weighted more heavily for each parent criteria.

TABLE 1

Key Strategy Measures for Success: Cloud Professional Services

Strategies Criteria	Criteria for Success	Subcriteria Weighting
Offering strategy		
Functionality or offering road map	Excellence is marked by plans to increase resources and knowledge of the cloud professional services practice.	4.0
Delivery model	Excellence is marked by plans to support cloud professional services utilizing more efficient tools and methodologies.	2.0
Cost management strategy	Superior service calls for ways by which the vendor can help clients justify expenditures for cloud professional services including ROI models and by providing clear paths by which the client can lower costs.	1.0
Portfolio strategy	A true portfolio strategy ensures that the client makes most effective use of the cloud professional services for business transformation.	3.0
Subtotal		10.0
Go-to-market strategy		
Pricing model	Vendor has superior planning for future pricing alignment with market direction.	3.0
Sales/distribution strategy	Excellence is demonstrated by plans to serve new market segments or specific industries.	2.0
Marketing strategy	Successful firms have a well-articulated plan for how they will market their capabilities in the future.	3.0
Customer service strategy	Successful firms continuously focus on ways to increase consistency in delivering cloud professional services.	2.0
Subtotal		10.0
Business strategy		
Growth strategy	Vendor has strategic plans that align well with the overall IT trends for the next two to five years.	4.0
Innovation/R&D pace and productivity	Vendor has strategic plans for attaining or retaining functional superiority over competition.	3.0
Financial/funding model	Vendor has viability of funding strategy for next two to five years and solid plans for growing revenue per employee.	2.0
Employee strategy	Vendor has clearly articulated plans for retaining top-performing employees.	1.0
Subtotal		10.0

Source: IDC, 2013

TABLE 2

Key Capability Measures for Success: Cloud Professional Services

Capabilities Criteria	Criteria for Success	Subcriteria Weighting
Offering capabilities		
Functionality/offering delivered	The ideal offer includes solutions along the full spectrum of cloud professional services.	3.0
Delivery model appropriateness and execution	The buyer is given flexibility in delivery to meet its culture and needs with options including onshore, nearshore, offshore, and vertical acumen. In a nutshell, how well a vendor's current delivery model meets with end-user preference for adoption and consumption.	2.0
Cost competitiveness	Pricing must reflect volume discounts and must be competitive with the market (pricing will be gathered and a midpoint established for each area). The cost of cloud professional services is made as efficient as possible using appropriate techniques and tools.	2.0
Portfolio benefits delivered	The offerings are well supported and enhanced by a portfolio of comprehensive IT consulting as well as complementary offerings such as business consulting, application management, and support services. That is, the vendor has the capability to provide end-to-end services.	3.0
Subtotal		10.0
Go-to-market capabilities		
Pricing model options and alignment	Flexible arrangements are available so that the client can choose to be billed as the budget allows.	4.0
Sales/distribution-structure, capabilities	Strength of vendor's global consulting practice per geographic area is one of the criteria for success.	2.0
Marketing	The services are geared toward well-defined target markets. The message is concise and appropriate for each of the target markets.	1.0
Customer Service	Customer service excellence is marked by how well a vendor provides customer service and the control they have over high customer satisfaction, customer retention, and local presence. How well the vendor is able to reach global customers and showcase local presence.	3.0
Subtotal		10.0

TABLE 2

Key Capability Measures for Success: Cloud Professional Services

Capabilities Criteria	Criteria for Success	Subcriteria Weighting
Business capabilities		
Growth strategy execution	Market momentum and growth is shown through acquisition of new capabilities as well as organic growth. This will be measured by the percentage of organic growth achieved compared with that of the industry average (mean percentage will be determined).	3.0
Innovation/R&D pace and productivity	Sufficient new development is taking place to stay ahead of, or in line with, competition. Utilization of consulting methodologies, techniques, and tools will improve productivity and increase market value.	3.0
Financial/funding management	How well a vendor is utilizing its resources to generate revenues for consulting services.	2.0
Employee management	Strength in managing employees is demonstrated by a high employee retention rate among the consulting workforce.	2.0
Subtotal		10.0

Source: IDC, 2013

FUTURE OUTLOOK

IDC MarketScape Worldwide Professional Services Market Vendor Assessment

The IDC vendor assessment for the cloud professional services market represents IDC's opinion on which vendors are well positioned today through current capabilities and which are best positioned to gain market share over the next few years. For the purposes of discussion, IDC divides potential key strategy measures for success into two primary categories: capabilities and strategies. Positioning in the upper right of the grid indicates that vendors have a perfect combination of capabilities to continue to be successful in today's ecosystem and have the right set of strategic initiatives to maintain and grow their future position in the market.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well it is aligned to customer needs. The capabilities category focuses on the capabilities of the company and services *today.* In this category, IDC analysts look at how well a vendor is building, pricing, positioning, and/or delivering capabilities that enable it to execute its chosen strategy in the market. On the y-axis, a position toward the top (north of center) indicates a strong set of differentiated capabilities to be successful in today's market.

Positioning on the x-axis, or the 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 strategic decisions and underlying assumptions about road maps for offerings, customer segmentation, business, and go-to-market plans for the future, which in this case is defined as the next three to five years. In this category, analysts look at whether or not a supplier's strategies in various areas are aligned with customer requirements in terms of spending, procurement, and delivery over a defined future time period. On the x-axis, a position toward the right (east of center) indicates a strategy that is not only well aligned with customer requirements but also agile and differentiated from the pack.

Figure 5 shows each vendor's position in the vendor assessment chart. Vendor market share is represented by the size of the circles.

IDC MarketScape Worldwide Cloud Professional Services
Vendor Assessment

IDC MarketScape Cloud Professional Services
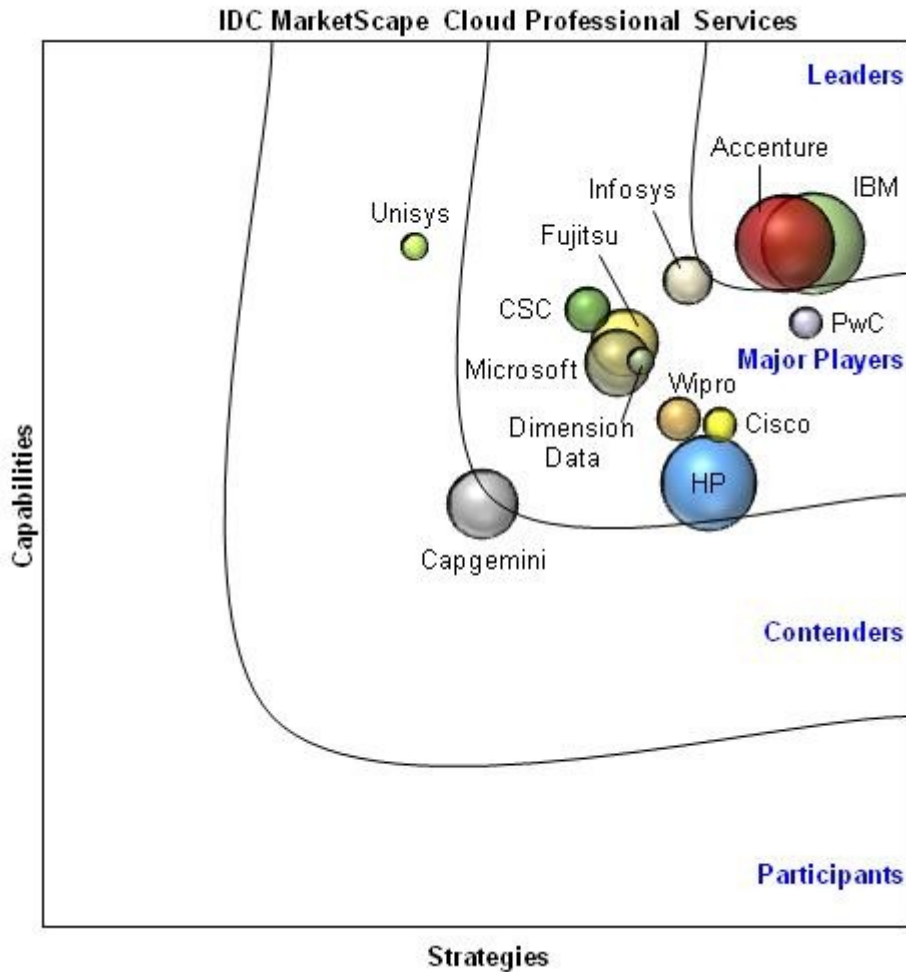
Source: IDC, 2013

Vendor Profiles

This section briefly explains the key observations that resulted in a vendor's position in the vendor assessment graph. While every vendor is evaluated against each of the 50 or so characteristics, the descriptions here provide a brief excerpt of the findings that represent the vendor's score. IDC's assessment includes 13 vendors (in alphabetical order for illustrative purpose only): Accenture, Capgemini, Cisco, CSC, Dimension Data, Fujitsu, HP, IBM, Infosys, Microsoft, PwC, Unisys, and Wipro.

After each vendor description, areas of strength and opportunity are identified. These relate to each vendor's highest and lowest scores on the 50 or so IDC MarketScape characteristics evaluated. Thus the areas of strength or opportunity are not a direct

comparison of one vendor to another but simply IDC's opinion about where a given vendor is doing its best and where it can focus on the most improvements. Regarding areas of opportunity, it's important to understand IDC is not identifying a vendor's weaknesses but rather a vendor's lowest individual scores.

Accenture

According to IDC analysis and buyer perception, Accenture is an IDC MarketScape Leader worldwide.

Accenture is investing heavily in cloud, having recently announced a $400 million investment over three years in April 2013. At the same time, Accenture launched the Accenture Cloud Platform, a cloud broker solution to help organizations integrate and manage in a hybrid world while bringing the most value to the business. In addition to the Accenture Cloud Platform, Accenture's investment covers four key areas:

☑ Professional services capabilities, including training, building new and existing offerings, and developing assets across the cloud stack

☑ Cloud ecosystem, made of up alliances with established technology companies and pure cloud players alike, including Amazon Web Services, Microsoft, NetSuite, Oracle, Pivotal, Red Hat, Salesforce.com, SAP, Verizon-Terremark, and Workday (Accenture also has go-to-market partners, such as Telstra. Accenture develops tools and training around specific technologies, working with leading partners.)

☑ Software and business process outsourcing offerings and business services, bringing pre-integrated solutions to clients to increase the speed and effectiveness, and decrease the risk of implementation

☑ Implementation of cloud at Accenture, which includes a cloud-based IT call center for HR services that runs in a SaaS model (After the largest email migration to the cloud to date, Accenture expects to save approximately $10 million per year.)

Accenture Portfolio

Accenture provides cloud professional services across consulting and outsourcing, bringing a combined business and IT approach. Accenture's approach has a very strong industry element. Accenture will deliver point solutions to specific challenges but is keen to address how the solution fits the strategic perspective and plan.

Accenture provides professional services in six areas, which address public, private, and hybrid solutions:

☑ **Cloud strategy:** Looking at the big picture evolution of IT

☑ **SaaS services:** Implementing new solutions and moving from packaged application solutions to the cloud

☑ **Cloud application and platform services:** Creating new custom applications or migrating legacy applications to cloud frameworks

- ☑ **Agile infrastructure:** Private build, public integration, and hybrid management

- ☑ **Cloud security:** A holistic approach to security to address new delivery models

- ☑ **Accenture cloud platform (on-premise):** Integration and orchestration of cloud technologies

Accenture Positioning

Accenture's position in the cloud ecosystem is as an independent cloud service provider and cloud integrator. Accenture uses deep industry knowledge, ecosystem relationships, and experience-as-a-service integrator and outsourcer to create differentiated solutions that address clients' unique issues.

Accenture Go to Market

Accenture goes to market with an industry-specific transformation agenda. Accenture targets the top end of the market, the Fortune 2000 customers around the world. It will target mainly existing clients, though its cloud capabilities have enabled it to reach a wider group of customers. Accenture leverages Avanade to target new clients and deliver Microsoft solutions such as Windows Azure, Dynamics, and Office 365 as well as private cloud implementations. Accenture has worked on more than 6,000 cloud projects for clients globally and has more than 7,900 professionals trained in cloud.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted Accenture to be most strong in the following areas:

- ☑ Ability to handle changes in project scope

- ☑ Presence of local offices and local resources

- ☑ Provide functional insights and competence

Cloud Professional Services Areas of Opportunity

Accenture can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

- ☑ Deliver innovation for client's solution

- ☑ Manage staff turnover during a project's lifetime

- ☑ Project value delivered for fee paid

Capgemini

According to IDC analysis and buyer perception, Capgemini is an IDC MarketScape Contender worldwide.

Capgemini continues to be a pioneer in helping exploit cloud benefits for its customers and views cloud as a fundamental design principle that underpins the majority of its solutions. Capgemini's "Simply. Business Cloud" approach puts

simplicity and business involvement as central to generating organizationwide benefits of cost-effectiveness, speed to market, and flexibility from the cloud.

Cloud is a ubiquitous design principle underpinning Capgemini's entire portfolio of solutions and services, which are customized to meet clients' business needs. Capgemini's report, *Business Cloud: The State of Play Shifts Rapidly,* highlighted the many issues facing clients moving to the cloud, such as security and data sovereignty, lack of integration, and the increasing involvement of the business in cloud decisions. Capgemini is leveraging its group capability to bring a powerful combination of platforms, integration, and consulting to bear in responding to these issues.

Capgemini, with more than 125,000 employees in 44 countries, is a provider of consulting, technology, and outsourcing services. The group reported 2012 global revenue of €10.3 billion. Together with its clients, Capgemini creates and delivers business and technology solutions that fit their needs and drive the results they want. As a multicultural organization, Capgemini has developed its own way of working, the Collaborative Business Experience, and draws on Rightshore, its worldwide delivery model.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted Capgemini to be most strong in the following areas:

☑ Leverage resources globally

☑ Integrate project team with my company

☑ Provide functional insights and competence

Cloud Professional Services Areas of Opportunity

Capgemini can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

☑ Deliver innovation for client's solution

☑ Manage staff turnover during a project's lifetime

☑ Apply proven cloud methodologies/tools

Cisco

According to IDC analysis and buyer perception, Cisco is an IDC MarketScape Major Player worldwide.

Cisco combines applications, infrastructure, and software to connect the company's customers to today's world of many clouds. By offering pretested, integrated, modular cloud solutions with industry-leading ecosystem partners for private, public, and hybrid cloud use, Cisco's cloud strategy is to enable deployment of cloud experiences tailored to customer needs.

Cisco's Cloud Services portfolio facilitates both accelerated cloud deployment and optimal cloud operation for customers to achieve rapid ROI on their investments. Supporting the life cycle of IT initiatives across "Plan, Build, and Manage," Cisco's Cloud Professional Services portfolio covers the customer journey to cloud for three key use cases: cloud adoption ("CAdoption"), build to use, and build to sell.

Cisco offers expertise in the following cloud services categories: cloud strategy, cloud planning and design, application migration (cloud onboarding), management and operation, cloud implementation, and cloud optimization. Cisco provides specific consulting and professional services around applications, operations enablement, cloud migration, workload mobility, service catalogues, and cloud storefronts. Cloud Enablement Services for Building IaaS Clouds and Cloud Enablement Services for Adopting Clouds are two particular areas of focus.

Cisco Cloud Enablement Services for Building IaaS Clouds

Cloud Enablement Services for Building IaaS Clouds provide customized strategy, planning and design, implementation, and optimization services based on targeted private/hybrid cloud offerings. Drawing on extensive experience delivering secure end-to-end virtualized datacenters, Cisco provides a comprehensive, architectural approach for enabling IaaS that considers the people, processes, and technologies involved across network, compute, and storage resources. Services include Cloud Strategy Service, Cloud Planning and Design Service, Cloud Implementation Service, and Cloud Optimization Service — all with a focus on cloud security.

Cisco Cloud Enablement Services for Adopting Clouds

Cloud Enablement Services for Adopting Clouds deliver expert help accelerate the adoption of a public/hybrid cloud model based on current environment and business goals. The service allows businesses (particularly service providers) to optimize existing infrastructure to realize the full benefits of their public cloud.

Why Cisco Services?

Cisco Services bring people, processes, and technologies together to help our customers accelerate datacenter and cloud transformation. Realizing the full value of datacenter investment faster and successfully transforming, optimizing, and securing datacenters are at the heart of the Cisco Domain Ten framework, Cisco's methodology for customer-centric engagement. Domain Ten covers infrastructure, applications, abstraction, virtualization, and automation along with security, compliance, process, and governance implications to define factors for successful datacenter and cloud transformation by:

- ☑ Aligning IT strategy with business goals

- ☑ Improving operation efficiency and reduce costs

- ☑ Enhancing application performance and availability

- ☑ Creating an agile and resilient foundation for business

- ☑ Enabling new business models

With 13,000+ personnel (including over 1,200 software developers) focused on services, Cisco leverages 29 years of networking innovation, best practices, methodologies, and tools to deliver a comprehensive suite of professional and technical services. Delivered by over 2,200+ certified industry and technology consultants with 3,300+ certifications, Cisco solves its customers' toughest business challenges with customer-centric service solutions in 180+ countries and 17 languages.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted Cisco to be most strong in the following areas:

☑ Provide technical insights and competence

☑ Provide functional insights and competence

☑ Ability to handle changes in project scope

Cloud Professional Services Areas of Opportunity

Cisco can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

☑ Optimize ratio of onshore/offshore efforts on a project

☑ Leverage resources globally

☑ Manage staff turnover during a project's lifetime

CSC

According to IDC analysis and buyer perception, CSC is an IDC MarketScape Major Player worldwide.

CSC is an independent IT services company, providing a range of cloud professional services that help organizations make the transition to a cloud-enabled business. Combining cloud consulting and implementation skills with deep industry knowledge, CSC helps some of the world's biggest organizations to be more innovative and achieve greater business agility.

CSC's portfolio of cloud professional services include:

☑ Cloud consulting services providing impartial guidance on how to establish new business capabilities using cloud technology; how to rationalize, transform, or optimize existing assets in a secure and a compliant manner; development of business cases, target operating models, IT architectures, transformation road maps, and implementation plans

☑ Software-as-a-service implementation and migration services covering a range of enterprise vendors including Salesforce.com and the Force.com platform, Oracle Fusion applications, Microsoft Office 365, Google Docs, and Cordys

- ☑ Application transformation services including FuturEdge, business process modernization and application portfolio management services, and the Application Cloud Enablement (ACE) Factory, a managed service that transforms and migrates custom applications to run in the cloud

- ☑ Infrastructure-as-a-service implementation and migration services including datacenter transformation, cloud service implementation and integration, design and build of virtualization solutions, and migration of customer workloads onto cloud platforms

- ☑ Implementation services relating to CSC's industry-specific cloud-based solutions such as CSC Breezeway — a suite of insurance services built on the Force.com cloud platform

CSC also offers a broad range of complementary services that facilitate a comprehensive business transformation, including:

- ☑ Business consulting and IT advisory services

- ☑ Business process outsourcing

- ☑ Industry-specific solutions (e.g., financial services, healthcare, manufacturing, government)

- ☑ Enterprise solutions (e.g., SAP and Oracle implementations)

- ☑ Applications modernization

- ☑ Big Data and analytics

- ☑ Cybersecurity

- ☑ Infrastructure and cloud managed services

CSC has deep technical expertise and has delivered some of the world's most complex transformation projects. CSC delivers the capabilities listed previously on a global basis, with major offices in the United States, Europe, Australia, and Asia and 90,000+ professionals operating out of more than 70 countries. Through the use of 60 World Sourcing Centers, CSC ensures that it brings the right expertise to meet a customer's needs regardless of base location.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted CSC to be most strong in the following areas:

- ☑ Presence of local offices and local resources

- ☑ Project value delivered for fee paid

- ☑ Deliver innovation for client's solution

Cloud Professional Services Areas of Opportunity

CSC can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

☑ Leverage resources globally

☑ Optimize ratio of onshore/offshore efforts on a project

☑ Breadth and depth of vertical-specific solutions

Dimension Data

According to IDC analysis and buyer perception, Dimension Data is an IDC MarketScape Major Player worldwide.

Dimension Data is a global ICT services and solutions provider with more than 21,000 employees and operations in 51 countries. The company provides a full suite of cloud solutions, including public cloud infrastructure as a service, private cloud, application services, and managed services. Dimension Data offers a full life cycle of services supported by a services strategy across networking, datacenter, unified communications and collaboration, security, virtualization, cloud, and multisourcing. Drawing on several decades of experience, Dimension Data recognizes and understands evolving technologies as it emerges and assists in converting the most appropriate ones into solutions that deliver measurable value. Dimension Data's consulting and professional services practices uses proven methodologies and IT technology domain expertise to deliver consulting services for on-premise, managed, hosted, or cloud-based solutions.

Dimension Data's cloud services portfolio comprises:

☑ **Cloud compute as a service (CaaS):** Virtual servers and storage provided as a service in both shared (public) and dedicated (private) environments:

❑ **Public CaaS** provides compute resources via a flexible, shared service with both pay-as-you-go and monthly plans. The service includes CPU, RAM, and storage on demand as well as a Web-based user interface and access to an application programming interface (API) for provisioning and orchestration. The service includes 24 x 7 access to a service desk and an online community support portal.

❑ **Private CaaS** provides a predetermined set of compute resources as a dedicated service deployed in a client datacenter. The service includes CPU, RAM, and storage as well as a Web-based user interface and access to an API for provisioning and orchestration. The service includes the cloud infrastructure, implementation, cloud orchestration and automation technology, and ongoing management by Dimension Data.

❑ **Hosted private CaaS** is a private CaaS hosted in a Dimension Data datacenter.

❑ **Provider CaaS** is designed for service providers to offer a branded public or private CaaS. The service can be customized with an organization's own brand and deployed in a Dimension Data or client datacenter.

❑ **Managed hosting** is dedicated infrastructure and application management services interconnected to Dimension Data's public and private cloud. It includes management of applications, data, databases, networking, virtual and physical servers, optimization, and performance.

◨ **Cloud enablement:** Advisory and consulting services to help clients understand cloud readiness, governance, IT optimization, datacenter consolidation, and technology architecture

◨ **Cloud integration:** Integration services across traditional on-premise IT systems and private, public, or hybrid clouds

◨ **Managed services:** A set of support services, including patch management, device configuration, and backup

◨ **Application services:** Applications hosted and operated on Dimension Data's Managed Cloud Platform (MCP)

◨ **Advanced cloud services:** Over-the-top services implemented on Dimension Data's cloud infrastructure

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted Dimension Data to be most strong in the following areas:

◨ Presence of local offices and local resources

◨ Provide technical insights and competence

◨ Deliver innovation for client's solution

Cloud Professional Services Areas of Opportunity

Dimension Data can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

◨ Meet the project timeline

◨ Breadth and depth of vertical-specific solutions

◨ Ability to handle changes in project scope

Fujitsu

According to IDC analysis and buyer perception, Fujitsu is an IDC MarketScape Major Player worldwide.

Fujitsu recognizes that cloud is intrinsically complex — one size does not fit all — and the FUJITSU Cloud Initiative offers IT leaders the choice and integration support that they are asking for. The new "Cloud Integration" concept combines consulting expertise and managed services to enable organizations to choose the right cloud options for them. It is then capable of integrating multiple cloud environments with its legacy systems, to deliver a seamless service to its customers and users.

Fujitsu has a standardized, consistent approach across its portfolio elements, for all its customers across the globe, including consulting and professional services. However, Fujitsu is aware that regional capacities and capabilities are influenced by customer demands, market maturities, and regional limitations.

Fujitsu Cloud Consulting Services

Fujitsu Cloud Consulting forms part of its IT Consulting Services portfolio available for business customers. The aim of these services is to ensure that Fujitsu customers' IT is able to quickly and efficiently adapt to new business requirements and is delivered in the most cost-effective model to suit the pace of their business growth. Fujitsu works with its customers to assess their current IT situation, delivering expert insight and robust recommendations that strengthen their decision making, in alignment with their business and technology. Examples of these services include:

- Making the right IT investments

- Learning how to deploy a hybrid cloud infrastructure

- Getting efficient support when consolidating their datacenter

Fujitsu Engagement Model

Fujitsu places specific emphasis on helping customers with their journey into the cloud based on following basic principles and four-step model:

- **Explore:** Understand current business and IT objectives and identify key business benefits and initiate the right cloud strategy

- **Assess:** Evaluate the opportunities and validate the business and IT environment to determine a path to move selected workloads to the cloud

- **Enact:** Create a solution that meets business and IT requirements by providing an architectural overview of the prospective cloud solution and then build and implement incrementally

- **Evolve:** Focus on continuous transformation into the cloud by reviewing the strategic, economical, and operational benefits of cloud services, to identify additional opportunities where the customer can benefit further from the cloud

Fujitsu's consulting perspective is based on six key areas to help assess the opportunities and impact of cloud: business innovation, customer experience, operational impact, technology, security, and compliance and risk. It is underpinned by an end-to-end portfolio that includes a comprehensive technology stack, flexible

management services, and expertise to match cloud to the needs of its customers' businesses.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted Fujitsu to be most strong in the following areas:

- ⊡ Provide industry insights and competence

- ⊡ Project value delivered for fee paid

- ⊡ Provide a full spectrum of IT services related to cloud (i.e., consulting, outsourcing, hosting, and support services)

Cloud Professional Services Areas of Opportunity

Fujitsu can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

- ⊡ Integrate project team with my company

- ⊡ Optimize ratio of onshore/offshore efforts on a project

- ⊡ Deliver innovation for client's solution

HP

According to IDC analysis and buyer perception, HP is an IDC MarketScape Major Player worldwide.

HP offers a comprehensive portfolio of professional services to help clients accelerate their journey to the cloud with choice, confidence, and consistency. Aligning with client needs in each phase of their cloud journey, HP's Cloud Professional Services offerings are categorized in three main areas: advise, transform, and manage. For advise, HP offers cloud advisory and strategy services to help organizations begin a cloud journey, develop a business case, and plan a multiyear cloud road map for private, managed, public, and traditional environments. In addition, HP offers services to transform existing infrastructure, applications, and business processes for cloud through applications transformation, cloud design services, and cloud implementation services. HP provides services to manage the ongoing operations and life cycle of cloud investment, including HP Cloud Operation Services and HP Cloud Education Services.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted HP to be most strong in the following areas:

- ⊡ Apply proven cloud methodologies/tools

- ⊡ Meet the project timeline

- ⊡ Breadth and depth of vertical-specific solutions

Cloud Professional Services Areas of Opportunity

HP can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

◽ Integrate project team with my company

◽ Deliver innovation for client's solution

◽ Manage staff turnover during a project's lifetime

IBM

According to IDC analysis and buyer perception, IBM is an IDC MarketScape Leader worldwide.

Through its broad portfolio of consulting, application, platform, and infrastructure services for cloud, IBM has helped thousands of clients adopt cloud models and manages 5.5 million cloud-based transactions every day. IBM helps clients in more than 18 industries build their own clouds or securely tap into IBM cloud-based business and infrastructure services. IBM uniquely brings together business consulting, industry and process knowledge, and a broad portfolio of cloud solutions, including its own software, hardware, and IBM Research innovations.

Cloud computing is one of four cross-company growth that plays at IBM and as such has received very strong investment. IBM has invested $4.5 billion in more than a dozen acquisitions since 2007, including, most recently, SoftLayer to extend IBM's public cloud capabilities. IBM has broad cloud capabilities, including more than 100 solutions, 10 global delivery centers, and more than 5,000 private cloud engagements. In 2012, IBM reported 80% increase in revenue from cloud computing across the company and more than 100% increase in new wins in its services portfolio.

IBM provides consulting services in all categories of IDC's evaluation, including strategy consulting, application development, integration and maintenance, infrastructure strategy, and design and network services. IBM has created IP-based solutions to help clients accelerate the business value from cloud computing, reduce risk, and speed implementation time. For example, IBM consultants use a unique cloud adoption framework and the IBM Cloud Workload Analysis Tool to analyze an existing environment and determine the cloud computing model best suited for the business model. IBM has also developed ROI tools and solution accelerators like the Cloud Migration Rapid Assessment that provides a cost-effective, low-risk plan for the migration of workloads to a new platform so that organizations can quickly realize the benefits of a cloud environment.

Additional Cloud Professional Services from IBM include:

◽ IBM Networking Strategy and Optimization Services assess the readiness of a network to support cloud computing and create a road map to identify possible challenges and mitigate business risks.

◽ Cloud application management services help clients take advantage of the flexibility and economics of cloud computing by offering cloud-enabled service

components across the application development and management life cycle. This includes cloud-enabled services for the support of SAP, Oracle, and business intelligence applications as well as custom application development, DevOps, mobile, and traditional testing.

☑ IBM Testing cloud services include Performance Testing and Application Virtualization. Performance Testing uses cloud elasticity to do real-world scale testing of Web and mobile applications in a cost-effective manner. Application Virtualization uses cloud to quickly create virtualized services in a complex application environment to do early-stage testing before all of the components of that application are available.

☑ IBM migration services for cloud assist clients, particularly those looking to modernize or transform their application portfolio, with the migration of their application portfolio to the cloud environment of their choice. These services support IBM cloud solutions, including private clouds on-premise, shared clouds, or hybrid cloud environments.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted IBM to be most strong in the following areas:

☑ Provide functional insights and competence

☑ Provide industry insights and competence

☑ Leverage resources globally

Cloud Professional Services Areas of Opportunity

IBM can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

☑ Integrate project team with client's company

☑ Manage vendor staff turnover during a project's lifetime

☑ Project value delivered for fee paid

Infosys

According to IDC analysis and buyer perception, Infosys is an IDC MarketScape Major Player worldwide.

Infosys' vision for cloud is to be a "Cloud Ecosystem Integrator" helping companies with large global footprints setup and govern a viable enterprise-specific cloud ecosystem. Infosys helps clients realize greater value from cloud by helping clients lower costs, improve innovation and agility, gain competitive advantage, and deliver superior business results more rapidly through cloud-based solutions. Infosys will help clients make the paradigm shift to leveraging cloud for business value in a simplified and convenient manner through the Cloud Ecosystem Integration model.

As a Cloud Ecosystem Integrator, Infosys acts as a strategic partner, helping clients take advantage of cloud-based solutions. Infosys helps businesses:

☑ Enable business agility, helping clients respond to business needs faster with simplified, agile IT, and scale rapidly to help the business capitalize on market opportunities faster with cloud services

☑ Manage complexity of change and operations by having a single point of accountability to create, transform, and manage their hybrid environment freeing themselves of vendor liaison or associated commercial and legal complexities

☑ Transition to a "service oriented" IT organization with a simplified pay-as-you-use cost structure for their IT by transitioning from "asset focused" to "service oriented" IT management, which is accomplished by transparent governance and management of IT costs with a single enterprise view

With Infosys as their strategic partner for cloud, clients can remove their commercial, technical, and legal barriers to cloud adoption by leveraging Infosys' professional services, industry partnerships with over 35 leading industry partners, and predesigned and integrated cloud solutions. Infosys brings deep expertise helping large enterprise clients successfully navigate their cloud journey and demonstrate business value regardless of where they are in the process:

☑ Infosys has executed over 200 cloud-related engagements for some of the world's leading companies across a number of industries, including retail, financial services, high tech, manufacturing, and transportation.

☑ Infosys' industry-leading Cloud Ecosystem Hub solution is the first of its kind solution that help clients build, manage, and operate a unified hybrid cloud environment.

☑ Infosys has also invested in its own services in the cloud, Infosys Edge — 12 business platforms through which our clients can leverage cloud for their business needs.

☑ Infosys works with 35+ partners including strategic cloud partners such as Microsoft, Amazon, and VMware and the entire ecosystem of cloud technology and service providers for brokerage, integration, PaaS, and IaaS and brings a single point of accountability to clients for all their cloud needs.

Infosys' value proposition to clients is to help them realize measurable business outcomes by accelerating their cloud adoption. Some of the outcomes delivered to clients are improving time to market for new products and solutions by 40–50%, increased productivity by 20–30%, reduced energy consumption by 90%, and delivered cost savings as high as 40%. Infosys has built a credible and compelling track record of helping clients realize business value from cloud and continues to build upon its position of leadership and helps clients steer their cloud journey successfully.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted Infosys to be most strong in the following areas:

- ☑ Project value delivered for fee paid

- ☑ Optimize ratio of onshore/offshore efforts on a project

- ☑ Provide technical insights and competence

Cloud Professional Services Areas of Opportunity

Infosys can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

- ☑ Presence of local offices and local resources

- ☑ Provide functional insights and competence

- ☑ Provide industry insights and competence

Microsoft

According to IDC analysis and buyer perception, Microsoft is an IDC MarketScape Major Player worldwide.

Microsoft Services delivers professional services through every stage of cloud adoption — from assessment and planning to deployment and support — for any combination of public/private/hybrid cloud models. By leveraging expertise across the broad Microsoft portfolio — along with a network of partners, technical communities, tools, and diagnostics — Microsoft Services helps customers address the dual challenges of adopting cloud services quickly and effectively while ensuring customers receive the most value from their investments in cloud over time. Drawing from experience with early adopter customers around the globe and direct access to Microsoft product teams, Microsoft Services provides a rich set of IP, proven practices, and tools to help customers transform their business through technology. Microsoft's portfolio spans both products and services, and Microsoft Services is uniquely positioned to bring them all together, providing solutions to a diverse set of customers and ensuring those solutions are adopted effectively and supported.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted Microsoft to be most strong in the following areas:

- ☑ Apply proven cloud methodologies/tools

- ☑ Integrate project team with my company

- ☑ Provide functional insights and competence

Cloud Professional Services Areas of Opportunity

Microsoft can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

☑ Manage vendor staff turnover during a project's lifetime

☑ Provide a full spectrum of IT services related to cloud (i.e., consulting, outsourcing, hosting, and support services)

☑ Optimize ratio of onshore/offshore efforts on a project

PwC

According to IDC analysis and buyer perception, PwC is an IDC MarketScape Major Player worldwide.

A Holistic Approach: Strategy Through Execution

PwC brings management and technology perspectives to clients' cloud initiatives from strategy through execution — whether companies are leveraging cloud services internally or launching cloud-based products and services. PwC starts with a cloud strategy and road map and helps leverage the cloud to spark innovation, foster new modes of customer interaction, and build more efficient operating models. PwC leverages the depth and breadth of experience across industries and global network to help ensure that initiatives map to business objectives.

To address both opportunities and challenges ushered in by the cloud, PwC provides a holistic cloud framework that helps companies wherever they might be in their cloud journey. Our cloud services span three key "value lenses": creating IT platform of the future, transforming internal business operations, and creating profitable cloud businesses. Each value lens encompasses a comprehensive suite of services that can help executives drive business transformation and address specific business issues. In addition, PwC's cloud services address the risk, security, compliance, and tax implications of the cloud.

PwC works with executives, across functional groups and industries. PwC understands how to meet each client's individual requirements as well as the collective needs of the entire enterprise. Part of PwC's success comes from the firm's in-depth understanding of the varying needs of the specific roles within PwC client's organizations such as the C-suite, IT, marketing, HR, and internal audit. PwC maintains a collaborative approach to solution development to enable the acceleration of change within the organization.

Last, PwC has forged alliances with major software and hardware vendors to create solutions that leverage the key strengths of each partner. PwC's thought leadership, C-suite insight, and consulting experience, along with the firm's partners' technology offerings and solution platforms, create powerful results. PwC's Cloud Innovation Lab leverages technologies from the company's alliance partners to provide proof of concept for its cloud solutions. Combining PwC's comprehensive methodologies and deep subject matter expertise with cutting-edge hardware and software, PwC's Cloud Lab showcases solutions that can create greater agility, boost financial results, and redefine customer engagement.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted PwC to be most strong in the following areas:

☑ Provide industry insights and competence

☑ Presence of local offices and local resources

☑ Apply proven cloud methodologies/tools

Cloud Professional Services Areas of Opportunity

PwC can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

☑ Provide a full spectrum of IT services related to cloud (i.e., consulting, outsourcing, hosting, and support services)

☑ Optimize ratio of onshore/offshore efforts on a project

☑ Leverage resources globally

Unisys

According to IDC's analysis and buyer perception, Unisys is an IDC MarketScape Contender worldwide.

Unisys cloud professional services help enterprise clients transform their IT environment to meet their business goals. Unisys' focus is on helping customers make the right IT sourcing decisions (traditional dedicated infrastructure, virtualized environments, private cloud, hosted private cloud, public cloud, IT outsourcing, etc.) leveraging transformational services and hosting capabilities to achieve maximum return from capital expenditures, reduce operating expenses, and increase business performance.

Unisys portfolio of cloud services is designed to drive down infrastructure costs, increase flexibility in operations, and achieve the agility to meet market demands. Unisys cloud solutions enable clients to design, build, and manage cloud infrastructure, with a focus on the applications that businesses use, the infrastructure in which these applications reside, and management of the IT environment. Unisys leads its approach with its Hybrid Enterprise strategy — an integrated single-service view encompassing traditional, cloud, internal, and external IT service delivery models that is borderless, virtual, automated, and secure. To accomplish this single-service view, Unisys provides solutions that help place business applications in the best fit cloud environment, build out mission-critical private and public cloud infrastructure, and ensure manageability and reliability of the entire IT environment. Some of the Unisys services for cloud are:

☑ **Intelligent Application Alignment (IAA)** discovers client applications, maps their interdependencies and key attributes, provides a blueprint of the client environment, and determines the best fit cloud or non-cloud delivery model.

- **CloudBuild Services** is a comprehensive series of consulting, integration, and support services that enable clients to successfully deploy a cloud while maintaining operational compatibility and transforming their existing infrastructure for the delivery of an agile IT-as-a-service model. CloudBuild Services is multivendor offering for the planning, design, and implementation of an enterprise cloud and is used in the implementation of the Unisys cloud management environment software offering, Secure Private Cloud.

- **Workspace as a Service** centralizes — some or all of the components of traditional desktop, tablet, and smartphone services — effectively by relocating pieces of the end-user computing environment to a virtualized cloud-based model enhancing security, productivity, and flexibility for the workforce.

- **Enterprise Broker Service (EBS)** provides a single integrated solution that provides easy access to IT services and cloud management. EBS offers a cloud brokerage platform for public and private cloud environments. By offering a single-service catalog across multiple cloud providers, EBS standardizes the client interface to a broad range of cloud resources.

- **Private Cloud Services** provides a flexible computing environment consisting of both virtual and physical servers in either a shared or a nonshared (private cloud) for customers who require server capacity on a subscription basis. Unisys' hosted cloud services are ISO 20000-certified ITIL V3–compliant and can be remotely managed, quickly implemented, and metered for usage. Application and data migration, cloud solution architecture, backup, and DR services are provided to onboard clients.

Unisys is providing cloud professional services to clients globally, spanning medium-sized and large enterprises as well as local, state, and national government entities.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted Unisys to be most strong in the following areas:

- Ability to handle changes in project scope

- Meet the project timeline

- Project value delivered for fee paid

Cloud Professional Services Areas of Opportunity

Unisys can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

- Optimize ratio of onshore/offshore efforts on a project

- Deliver innovation for client's solution

- Manage vendor staff turnover during a project's lifetime

Wipro

According to IDC analysis and buyer perception, Wipro is an IDC MarketScape Major Player worldwide.

Wipro has set up the "Advanced Technologies" service line to harness the combined power of cloud, mobility, analytics, social, and smart sensor technologies. Wipro aims to transform business processes by the convergence of these technologies and create seamless end-customer experiences.

Wipro created the Integrated Cloud Services practice in 2010, incorporating professionals from the infrastructure, application, and process domains. The practice has since grown to over 1,400 professionals across sales, practice, and delivery competencies and leverages its unique set of IPs and partnerships to drive large transformational programs.

Wipro's Cloud Professional Services portfolio encompasses:

☒ **Cloud Infrastructure (IaaS):** Datacenter modernization services through the private, public, and hybrid cloud models

☒ **Cloud Platforms:** Application modernization using public and private PaaS and ISV enablement

☒ **Applications (SaaS):** Implementation and rollout services for Cloud CRM (salesforce.com), Cloud HCM (Workday), and Cloud ERP (NetSuite)

☒ **Business Processes (BPaaS):** HR BPaaS, F&A BPaaS, and vertical-specific BPaaS

The Cloud Professional Services portfolio is further enhanced with a strong set of complementary offerings:

☒ Advisory across architecture, infrastructure, and applications (Wipro deploys a unique Cloud Inventory Analysis Tool to assess the amenability of applications and processes to the cloud.)

☒ Integration Services for seamless integration of applications and data across cloud and on-premise

☒ Security, enabled through Wipro CloudTrust, a comprehensive life-cycle framework that addresses security challenges for enterprises adopting cloud

☒ Testing and Validation Services encompassing applications testing, performance testing, development/test environments on cloud, and testing cloud service providers implementation

Significant focus on innovation has led to the development of a comprehensive set of tools, frameworks, and platforms, which enhance the cloud experience across the life cycle (advise-design-build-manage). Cloud Command Center is one such innovation, which provides a single platform to provide, configure, secure, monitor, and manage applications and infrastructure for an extended enterprise.

Wipro's Cloud Services portfolio leverages strategic global alliances across the cloud ecosystem, including AWS, BMC, Cisco, Citrix, EMC, Google, HP, Microsoft,

NetSuite, salesforce.com, Telstra, and Workday. For Cloud Integration, Wipro has partnered with Cast Iron, Dell Boomi, Informatica, and MuleSoft.

Cloud Professional Services Areas of Strength

According to IDC's 2013 *Global Cloud Professional Services Buyer Perception Survey,* clients highlighted Wipro to be most strong in the following areas:

☑ Leverage resources globally

☑ Provide a full spectrum of IT services related to cloud (i.e., consulting, outsourcing, hosting, and support services)

☑ Presence of local offices and local resources

Cloud Professional Services Areas of Opportunity

Wipro can further enhance its position in this IDC MarketScape by improving its client perception in the following areas:

☑ Manage vendor staff turnover during a project's lifetime

☑ Apply proven cloud methodologies/tools

☑ Integrate project team with client's company

Other Suppliers

A large number of cloud professional service providers are serving local markets around the globe. The intent of this analysis is to focus on the major players participating in the worldwide cloud professional services consulting market.

ESSENTIAL GUIDANCE

The key finding of this research is the overall strength of the capabilities of the majority of the vendors, but at the same time, certain areas require improvements. These improvements would elevate a vendor's position in the cloud professional services market and would eventually help attract buyers. The sections that follow highlight the stronger as well as the weaker aspects of vendors, in an effort to provide guidance to both the suppliers and the buyers in the cloud professional services market.

Advice for Cloud Professional Services Buyers

☑ **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool not only to short list vendors for cloud professional services bids but also to evaluate vendors' proposals and oral presentations. The breadth and depth of professional services offered is strong for the majority of providers in this analysis. Make sure you understand where these players are truly differentiated and take advantage of their expertise, industry based or otherwise.

☑ **Vendor staff turnover.** If your providers don't bring up the subject, make sure you do. Develop a plan for communicating and managing vendor staff transitions, before they happen, during contract negotiations.

- ⊠ **Engagement economics.** Make sure you understand the nuances of alternative pricing schemes for cloud professional services, especially when consulting and integration engagement pricing is embedded in the pricing of related cloud services. While time and materials or fixed price engagements are still the dominant approaches for cloud professional services, numerous alternative arrangements are on offer. IDC believes both capital expenditures and operating expenditures have their place and neither is inherently better or worse than the other. The key is to understand how the pricing of a given engagement works, and to make sure it supports your overall goals.

Advice for Cloud Professional Services Firms

- ⊠ **Employee strategy.** Make sure you are attracting and retaining the best people, and that before the inevitable staff turnover occurs on a project, you have developed a plan with your customers to manage this transition. While cloud services are a highly technical offering with lots of embedded intellectual property, the professional services required to build and implement these cloud services still require highly skilled professionals. When IDC aggregated customer feedback across all vendors evaluated, "manage vendor staff turnover during a project's lifetime" received the lowest score. IDC believes customers expect staff transitions, but providers that excel at managing these transitions more effectively will increase customer satisfaction and, ultimately, demand for their services.

- ⊠ **Geographic strategy.** Align your sales and delivery professionals with the priorities of customers or prospects in each region. Regarding sales, each macroregion had a different top priority. Likewise, regarding delivery, each macroregion also had a different top characteristic that defined project success. While each customer or prospect in a given country may deviate from IDC's findings, use these findings as a basis for starting the conversation.

- ⊠ **Offering strategy.** Functional and industry expertise will increasingly be required to win cloud professional services contracts related to implementing future workloads in the cloud; likewise, there will be opportunities for providers to be vertical-specific aggregators or orchestrators of cloud services. And this means providers must be proactive to include line-of-business executives, as well as IT executives in the discussion, because research shows that the move to cloud is about more than lowering IT costs.

LEARN MORE

Related Research

- ⊠ *Worldwide and U.S. Cloud Professional Services 2013–2017 Forecast* (IDC #241811, June 2013)

- ⊠ *Worldwide and U.S. Systems Integration Services 2013–2017 Forecast* (IDC #240894, May 2013)

☒ *Worldwide and U.S. IT Consulting 2013–2017 Forecast* (IDC #240825, April 2013)

☒ *2013 U.S. Professional Services Opportunities Related to Cloud Services* (IDC #239862, March 2013)

☒ *Predictions 2013: New Models Take Hold and Opportunities Emerge in the Global Services Market* (IDC #WC20130205, February 2013)

☒ *Top 5 Service Firms Grow Salesforce, Google Apps, and Workday Certifications Combined by 71%* (IDC #lcUS23909913, January 2013)

☒ *Cloud Professional Services in 2012* (IDC #lcUS23884212, December 2012)

☒ *NASA JPL: Do You Really Need a Rocket Scientist to Navigate Between the Clouds?* (IDC #237857, November 2012)

☒ *Worldwide and Regional Public IT Cloud Services 2012–2016 Forecast* (IDC #236552, August 2012)

☒ *10 Questions for Buyers to Ask Cloud Professional Services Providers* (IDC #236508, August 2012)

☒ *Best Practices: Adoption and Professional Services Trends for Cloud Computing in Manufacturing* (IDC Manufacturing Insights #MI236021, July 2012)

☒ *Kindred Healthcare: Better Content Distribution and Closed-Loop Marketing with Help from Appirio and Salesforce.com* (IDC #235784, July 2012)

☒ *IDC's Worldwide IT Cloud Services Taxonomy, 2012* (IDC #233396, March 2012)

☒ *Worldwide Cloud Systems Management Software 2012–2016 Forecast* (IDC #234001, March 2012)

Synopsis

This IDC study represents a vendor assessment of the 2013 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.

"Vendors generally received their highest marks from buyers in the area of providing technical insights and competence," said Gard Little, research director, IT Consulting and Systems Integration Services, "whereas the lowest scores were for managing vendor staff turnover during a project's lifetime. Providers that excel at managing these transitions more effectively will increase customer satisfaction and, ultimately, demand for their services."

Copyright 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.