

IDC MarketScape

# IDC MarketScape: Worldwide Industry Cloud Professional Services 2022 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES DELOITTE

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Industry Cloud Professional Services Vendor Assessment



Source: IDC, 2022

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

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Industry Cloud Professional Services 2022 Vendor Assessment (Doc # US48187622). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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The industry cloud professional services (CPS) market continued to grow and evolve rapidly in the three years since the last IDC MarketScape for worldwide industry cloud professional services. Major new entrants, such as cloud service providers and enterprise software vendors, launched dozens of high-profile offerings, while global SaaS and platform providers continued to release a steady stream of industry-specific bundles. Prompted by the COVID-19 pandemic to move operations online, many industry players, especially those in the medical and public sectors, began building industry cloud capabilities on their own.

The cloud professional services firms represented in this study played a central role in all these new developments in the industry cloud market. They became key partners in the design, development, and go-to-market (GTM) activities of the "new" market participants, and they accelerated their own industry cloud development, often building complementary solutions and extensions on top of the cloud and software vendors' platforms or partnering with the industry organizations looking to develop their own.

Professional services firms were cited by nearly half (49.8%) of the industry cloud users in the recent IDC's *Industry CloudPath Survey* as one of the vendors providing them with industry cloud services. Amid such high interest and demand from all sides, it is not surprising that the vendors in this IDC MarketScape show exceptional strengths in multiple industries and verticals.

Providing use case-based industry cloud solutions allows professional services vendors to get even closer to the heart of the day-to-day operations and business challenges that their clients face. The firms leverage their industry expertise, their technical skills, and partnerships not only to solve their client's business challenges but also to build valuable new technology assets that can often be monetized repeatedly.

In the process, many professional services vendors are undergoing their own digital transformation, adjusting their organizations to the structural, cultural, and operational changes needed for this new business model to succeed. Some IDC MarketScape participants are further along their development path than others, but all of them see the potential and promise of industry clouds. They are building the products and services that will enable them and their clients to seize the opportunity.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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Using the IDC MarketScape model, IDC studied nine organizations that offer industry clouds and related services. Evaluated vendors had to meet the following criteria to qualify for this vendor assessment:

- The vendor's services must have been purchased within a recent industry cloud deal.

- The vendor must perform professional services as its primary business model.
- The vendor had a minimum of \$100 million in annual cloud professional services revenue in 2021.
- The vendor has revenue in at least two geographic regions.
- The vendor has established expertise in at least two industries or verticals.

Only vendors that perform professional services as their primary business model were included. Vendors that primarily provide technologies like software and hardware were excluded despite having professional services arms that have implemented industry clouds.

## ADVICE FOR TECHNOLOGY BUYERS

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For most buyers, the value proposition of industry clouds is (at least) twofold. One is the platform-based model that offers integrated, industry-specific governance, compliance and security standards, and workflows, which attracts buyers looking for a more comprehensive but faster and possibly easier move to cloud. For users who already have advanced cloud operations, the value of industry clouds might be in the many use case-based extensions and applications that offer plug-and-play ease and flexibility. Industry cloud professional services vendors such as those profiled in this study can help you choose the model that works best for you and build it using their industry expertise, vertical assets from their rich catalogs, and their deep project management experience. Some other factors to consider include:

- Look for vendors that have experience building industry clouds with open and composable architectures. Various connectors and APIs are a must to accommodate the flexibility and ecosystem management approach companies need in a digital-first enterprise environment.
- Select vendors with expertise in the right verticals or micro-verticals and include talent, team alignment, leadership expertise, partnerships, and project experience in your evaluation.
- Consider your organization's appetite for using shared risk models and vet your vendors on their experience with such compensation options.
- Assess the vendor's sustainability/ESG tracking and reporting offerings against the capabilities that are important to your organization. Most vendors today offer ESG solutions and integrations but ensuring compatibility early can prevent complications later in the process.
- Plan for future evolution and expansion of your technology environment by selecting vendors that have an industry cloud strategy and road maps compatible with yours.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### Deloitte

Based on close evaluation of the company's strategies and capabilities and on client and partner feedback, IDC has positioned Deloitte in the Leaders category in this 2022 IDC MarketScape for worldwide industry cloud professional services.

Deloitte maintains a long track record of building industry clouds, starting in 2002 on shared infrastructure in colocation datacenters, and later leveraging hybrid and public cloud models for its initial offerings in health and human services, financial services, and media sectors.

Today, Deloitte has amassed a collection of 450 industry clouds and related solutions across verticals and technologies and at various stages of maturity. The development of repeatable industry-specific and cross-industry assets and IP is a focus for the firm. This enables it to deliver use case-centered, "opinionated" solutions with flexible architectures made up of the most relevant best-of-breed products and services for the industry. This approach is well suited to the needs of clients that operate in industries that are transforming and often converging and that require a partner that is an experienced ecosystem orchestrator. Deloitte continues to aggressively grow its industry clouds business, recently announcing substantial investments in building out platforms for multiple industries and cross-industry assets.

Headquartered in New York City, New York, Deloitte has 35 delivery centers across the United States, Latin America, Eastern Europe, and APAC regions, with the bulk of its industry cloud engagements based in North America and Europe and for large enterprise clients. The company has over 120,000 employees available to work on industry cloud projects, with a good balance among them of technical and industry expertise.

Deloitte has built dozens of industry clouds across all major sectors and verticals. The top 6 industries include government (including federal, state/local, and higher education), financial services, healthcare, life sciences, consumer (including retail), and media and entertainment.

### ***Strengths***

Deloitte has extensive experience in building industry clouds and deep domain expertise in verticals, as well as the technologies that the company serve. The company has a mature and deliberate approach to working with partners and ecosystems, a loyal client base, and a rich library of composable, innovative assets. It is focused on continuously developing its people, engineering resources, and M&A activities in support of its industry clouds practice.

### ***Challenges***

It remains to be seen if Deloitte can sustain the pace of growth and investment in industry clouds. The company can also look to efficiently maintain and evolve its large technology assets portfolio along with its business and industry practices to continue to provide the high level of services its loyal and long-term clients have come to expect.

### ***Consider Deloitte When***

Consider Deloitte when you want a proven and creative partner that can codevelop and build industry clouds fast for complex and transformative use cases. Deloitte's expertise in niche markets across industries and the company's deep experience with AWS, GCP, Oracle, SAP, and Salesforce technologies make the firm a good partner for co-innovation projects.

## **APPENDIX**

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### **Reading an IDC MarketScape Graph**

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

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

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

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

While the nine vendors evaluated in this IDC MarketScape have the most mature and comprehensive industry cloud portfolios and practices, other professional services firms are also active in this technology area and may be worth considering, depending on your needs.

## 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

IDC defines industry clouds as cloud-based platforms, products, or services providing industry-specific capabilities and value through vertical integration, collaboration opportunities, and the network effect. Industry clouds can offer information, technology, or operational capabilities and can serve any aspect of the business.

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, 2021* (IDC #US47191221, May 2021).

## LEARN MORE

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### Related Research

- *The Buyers' View of Industry Clouds: Global Survey Results* (IDC #US49491322, August 2022)
- *Partnering for Success in Industry Clouds* (IDC #US48924722, June 2022)
- *Industry Cloud Directory – Semiannual Update, 2Q22* (IDC #US47505922, June 2022)
- *What Role Do Industry Clouds Play in Industry Ecosystems?* (IDC #US49064322, May 2022)

- *IDC PeerScape: Practices in Collaborating with the Competition* (IDC #US48550022, January 2022)
- *Market Analysis Perspective: Worldwide Industry Clouds, 2021* (IDC #US48011721, November 2021)

## Synopsis

This IDC study provides an assessment of the market for industry cloud professional services and how some of the major professional services firms are engaged in the space. Using the IDC MarketScape model, we have identified what criteria are important for companies selecting a service provider for an industry cloud-related project and how the vendors in this study performed against these criteria overall. Interviews and surveys conducted with the vendors' industry cloud clients and partners provided additional feedback and details for the evaluations.

"Buyers across industries and geographies are enthusiastic about industry clouds, both in adopting some that are commercially available and in developing their own. Since cloud professional services vendors usually play important roles in any industry cloud project, we are excited to offer buyers an objective assessment tool that can help them make better decisions when selecting their professional services partners," said Nadia Ballard, research manager for Industry Clouds and SaaS at IDC.

## About IDC

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

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