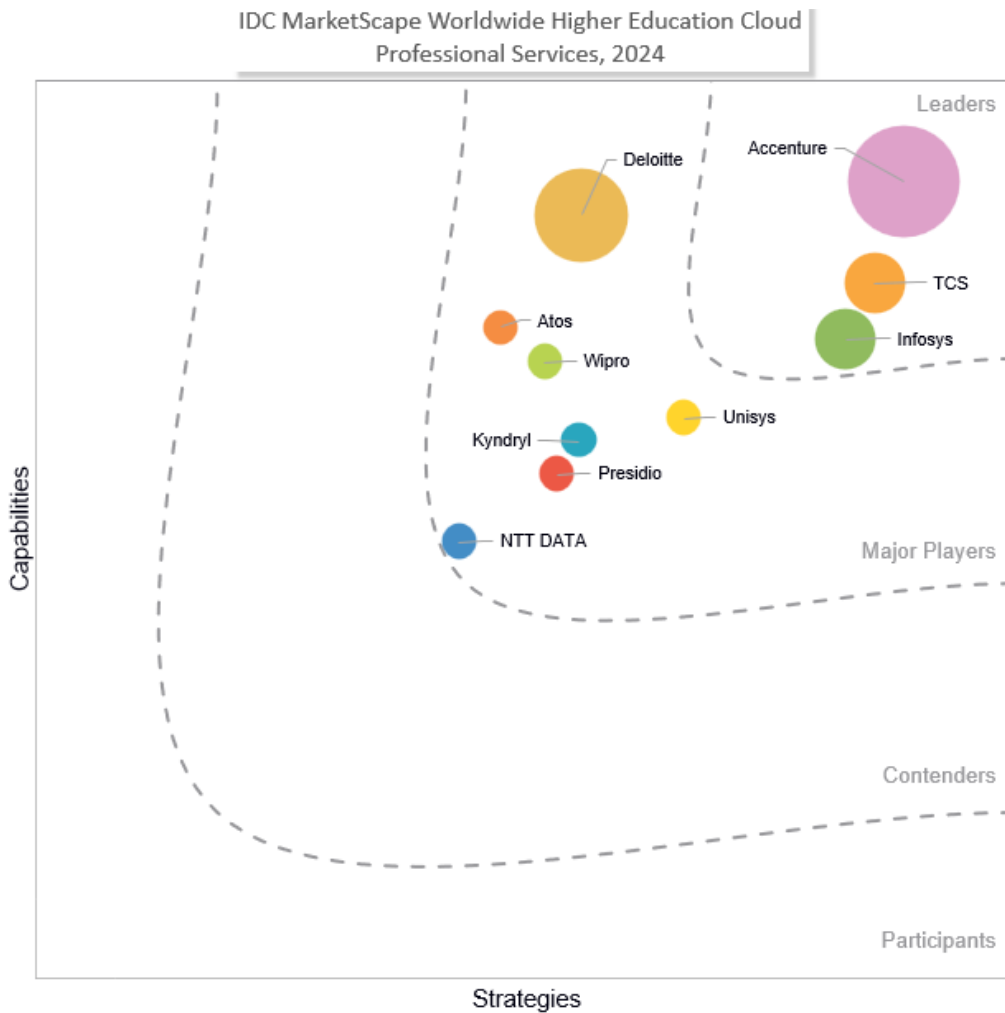# IDC MarketScape: Worldwide Higher Education Cloud Professional Services 2024 Vendor Assessment

Matthew Leger

THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE

IDC MARKETSCAPE FIGURE

IDC MarketScape Worldwide Higher Education Cloud Professional Services Vendor Assessment

Source: IDC, 2024
Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Higher Education Cloud Professional Services 2024 Vendor Assessment (Doc # US49968823). 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

Catalyzed by the rapid shift to online operations and learning in early 2020, higher education institutions have accelerated their cloud transformation strategies in the past few years. Today, many higher education IT leaders are continuing their cloud transformations to streamline campus operations, enable operational agility, improve security and compliance, enhance the digital student experience, modernize IT infrastructure, and optimize IT costs. However, due to IT ecosystem complexity, cultural challenges, transformation fatigue, as well as IT resource constraints and talent shortages, higher education still lags behind many other industries in cloud adoption. In the face of these challenges, higher education leaders around the world are increasingly partnering with cloud professional services providers (CPS) to maximize cloud investments and ensure continuous transformation.

In choosing a cloud professional services provider, higher education IT leaders are seeking vendors that can serve as long-term partners on their cloud transformation journey. They are prioritizing vendors with not just technical chops and security capabilities but those that also have demonstrated success, experience, and expertise in higher education. Institutions are also prioritizing vendors that will serve as thought partners and advisors in their efforts to simply their IT ecosystems and transform campus operations and student experiences. Value for the money, cost competitive offerings, contract flexibility, and the ability to be agile and adaptable in their approach to cloud are also highly desirable. Most importantly, higher education institutions need a partner that understands the operational and business model complexities of higher education that can help them navigate both the technical and human aspects of digital transformation. The vendors that align most closely with these requirements are poised to succeed in the global higher education market.

This IDC MarketScape vendor evaluation delves into the landscape of the following leading cloud professional services vendors serving the worldwide higher education market: Accenture, Atos, Deloitte, Infosys, Kyndryl, NTT DATA, Presidio, TCS, Unisys, and Wipro. Understanding the specific challenges and priorities of institutions in this sector, this evaluation goes beyond the standard CPS consulting and technical capabilities, examining each vendor's industry-specific solutions, knowledge, and experience, including their ability to handle sensitive institutional data, navigate complex regulatory and compliance requirements, and drive cultural and operational change in the industry. This research, the first known global higher education-focused CPS vendor evaluation, was conducted to analyze each vendor's strengths and areas for improvement, helping higher education IT leaders make informed decisions when choosing a trusted partner to advance their cloud transformation ambitions and achieve their strategic goals.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

Vendors included in this assessment must meet the following inclusion criteria:

- Vendors must have existing higher education customers in at least two major geographic regions (EMEA, LATAM, NA, APAC) with plans for further global/regional expansion in the industry.
- Vendor must offer each of following four project-based cloud professional services in the higher education sector: IT consulting, systems integration, custom application development, and/or network consulting and integration.
- Vendor must have a dedicated higher education industry vertical team/business unit with professional teams/SMEs, products/services, go-to-market strategy, and cloud offerings specific to the industry.
- The vendor's cloud professional services offerings must be vendor agnostic. This excludes hyperscalers (e.g., Microsoft, AWS), implementation partners that offer services for only one specific cloud providers, and tech companies with professional services arms for their own solutions.
- Management consulting firms (e.g., BCG, McKinsey) are excluded from this study.

For this IDC MarketScape evaluation, IDC included the following 10 vendors based on the aforementioned inclusion criteria: Accenture, Atos, Deloitte, Infosys, Kyndryl, NTT DATA, Presidio, TCS, Unisys, and Wipro.

ADVICE FOR TECHNOLOGY BUYERS

- **Do your homework, evaluate vendors based on a diversity of resources.** Leverage a range of industry resources, as well as market research and analyst reports, to compare potential providers across key criteria that align with your buying priorities and preferences such as price, service offerings, and customer satisfaction. Leverage these resources to narrow your vendor search and invite a select number of vendors to submit a proposal or provide a briefing.
- **Prioritize higher education domain knowledge and expertise.** Identify providers with dedicated higher education practice teams with leaders that have meaningful industry practitioner experience, not just general cloud expertise. Teams with deep higher education expertise better understand unique nuances like compliance, data privacy, and legacy systems integrations within the academic environment. Seek references from other CIOs in similar institutions to gauge the provider's track record and understanding of your specific challenges.
- **Identify vendors with shared mission and values.** Seek a provider that aligns with your institution's mission and values. Look for partners that are passionate about helping higher education institutions achieve their strategic goals and address their most complex business challenges such as enhancing student experience and success, closing enrollment gaps, and driving operational efficiencies and IT cost optimization. This shared purpose fosters a collaborative environment and ensures your cloud journey is guided by a common vision for the future of higher education.
- **Consider providers with demonstrated experience and measurable success working with institutions of similar size and complexity on related cloud projects.** Look for vendors with experience successfully conducting large-scale migrations or other cloud projects at institutions of similar size and complexity. Closely assess whether they have the experience to successfully replicate those efforts within the context of the goals/requirements of your

institution. Pressure test the vendors to provide hard evidence and measurable outcomes from cloud projects completed for other institutions.

- **Evaluate providers for their ability to support your institution's growth and evolving needs**. Assess vendor's commitment to staying updated on the latest cloud technologies and their ability to provide ongoing innovation and support specific to the needs of higher education, not just one-time project delivery. Seek vendors that you would be comfortable working with for the long term as a strategic partner along the road on your digital transformation and/or cloud journey.

- **Evaluate beyond technical capability, place greater value on change management and business transformation.** Don't just choose a provider based on technical prowess; assess their ability to guide and support your institution through the complex human and operational challenges that often slow or prevent digital transformation or broader cloud adoption. Understand their methodology for road map development, change management, and training that ensures sustainable value creation beyond technical migration.

- **Assess the vendor's security and compliance capabilities.** Higher education faces stringent data privacy and security regulations. Ensure the provider prioritizes a secure cloud environment, understands relevant compliance frameworks (e.g., FERPA, HIPAA, GDPR. CMMC), and offers ongoing security assessments and support. Evaluate their incident response protocols and disaster recovery plans to ensure business continuity in case of disruptions.

- **Seek value for money, not just lower priced proposals.** While budget considerations are crucial, resist the temptation to chase the lowest bidder. Remember, the "cheapest" option isn't always the best value. Instead, seek a provider that offers the best value for money, balancing cost with proven expertise, strategic guidance, and long-term ROI. By investing in a provider that understands the unique needs of higher education and prioritizes holistic value creation, you unlock a sustainable and cost-effective path for cloud, ensuring your institution reaps the long-term benefits of cloud investments.

- **Prioritize collaboration and knowledge transfer to ensure cloud service independence.** Seek a provider that is equipped and willing to provide effective knowledge transfer and cloud training for your institution's IT and nontechnical staff throughout the cloud effort. Focus on building up technical knowledge and expertise internally to reduce dependency on the provider and to mitigate the risks of vendor lock-in.

- **Think beyond the initial cloud implementation, assess post-implementation support models.** Be sure to evaluate the vendor's post-implementation support model to ensure they offer ongoing optimization, security monitoring, maintenance services, and other capabilities to maximize your cloud investment in the long term and enable continuous transformation.

VENDOR SUMMARY PROFILE

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.

Accenture

IDC has positioned Accenture in the Leaders category in this 2024 IDC MarketScape for worldwide higher education cloud professional services.

Strengths

- **Combined industry domain experience and technical expertise**. Accenture has over 500 employees in their education business unit, almost all have practitioner and IT experience in the sector. The firm has served higher education for 35 years and has supported over 300 institutions across the globe, including public and private universities, community colleges, as well as Ivy league and Russell Group institutions. In addition, Accenture has more than 733,000 employees in more than 120 countries, including more than 199,000 professionals in its Cloud First business unit. In FY 2023, the company invested more than $1.1 billion in training and professional development of its staff including training in cloud, data, and AI. Across the company, the firm holds more than 160,000 cloud certifications across all hyperscaler and several major SaaS providers, and its cloud teams have experience with more than 36,000 cloud projects across industries. The practice's capabilities are augmented and complemented by a partner ecosystem of more than 250 software, hardware, and services companies. Customers frequently noted that Accenture's wide-ranging experience and domain knowledge in higher education, coupled with the company's breadth and depth of technical capabilities, was key to the success of cloud projects. Several customers noted that Accenture's ability to understand the intricacies and operational complexities, as well as the overall drivers of transformation in the sector, played a role in their selection of Accenture.

- **Change management capabilities with a high degree of human awareness.** Accenture offers a complete set of change management capabilities. The company has made several acquisitions in recent years for the sole purpose of enhancing its digital and talent change management offerings. Its change management capabilities are deeply rooted in experience and complemented by behavioral research (including a behavioral assessment developed in partnership with Harvard University to measure team performance, psychological safety, and motivation). The company has also developed a proprietary tool called myNav, which is designed to help customers leverage best practices and automation to build the business case for cloud quickly and effectively. Several customers noted Accenture successfully helped them navigate the complex human challenges of cloud transformation, particularly as it relates to working with other non-IT stakeholders and departments. They noted that Accenture's ability to clearly explain the operational and technical complexities in addition to the value departments will receive from cloud transformation was a differentiator. They also noted that Accenture's ability to bring evidence and research to the table to support decision-making has enabled them to make better decisions and communicate more effectively with critical stakeholders.

- **Trusted partnership and commitment to customer success**. Customers referred to Accenture as a trusted partner, noting that they felt like a member of the team that was committed to shared goals. Customers particularly appreciated the time and care Accenture took to understand their unique environment and clearly define the goals they wanted to achieve, which helped ensure long-term success of the project, mitigate disruptions, and realize return on investment. This is not just a customer service tactic but is something the company has

internalized in its operations. To ensure mutual success, Accenture has built an internal tool called the "360° Value Meter" to measure both company and client success. The meter is used for both internal and external purposes and is built to track success metrics and identify risks for both Accenture and clients. The platform supports this by tracking not only financial metrics but also progress toward sustainability, talent, and inclusion and diversity goals and the creation of meaningful experiences for customers, employees, and stakeholders.

Challenges

- **Aligning pricing model and contracting terms with industry needs**. Across the board, customers noted that Accenture's pricing model and contracting terms were a key challenge for the company to address, particularly for institutions struggling with precarious financial challenges or limited IT resources. While many felt that they certainly received value for the money they paid, there was often a psychological barrier, or a "sticker shock" factor, that made it challenging for key stakeholders to agree to work with Accenture. Several customers noted that Accenture had room to improve on developing a more price competitive and flexible commercial model that would be more attractive and digestible to higher education. To address this, Accenture has developed a number of prebuilt "accelerators" to reduce required hours and lower risk, but that only helps its competitiveness where its customers are evaluating bids by fixed/total cost versus lowest hourly rate.

- **Industry-specific cloud solutions**. Accenture has invested heavily in industry cloud, having developed more than 30 industry cloud solutions to date, including several in the public sector, but it has not yet developed an industry cloud solution for higher education. Accenture's strategic approach is to leverage the company's software partner ecosystem to build solutions in partnership with higher education clients on a case-by-case basis and the company has codeveloped industry-specific solutions with go-to-market and channel partners. Several of Accenture's industry cloud solutions built for government have proven to be highly applicable to higher education use cases (e.g., grants or sponsored research) and can be leveraged with minor tailoring for the higher education client. Accenture does also have plans to build a higher education industry cloud solution. The Accenture team notes that it is committed to continuously developing industry-specific solutions for, and serving the needs of, higher education.

- **Building expertise in industry-specific systems**. Accenture has dedicated significant resources to building expertise in industry-specific enterprise applications such ERP, SIS, and CRM with partners like Workday, Salesforce, and Oracle. Customers recognized and acknowledged the deep technical expertise the company has built in these areas but noted that they would like to see Accenture improve capabilities in other areas specific to higher education such as learning management systems and other edtech tools used in academic teaching and learning settings. As it relates academic technology, Accenture focuses on the integration of these tools and applications to enable an effective end-to-end higher education cloud ecosystem, as well as the development of bespoke custom applications targeted to higher education.

Consider Accenture When

Higher education institutions should consider Accenture for cloud professional services needs when they are seeking a firm with deep industry expertise and experience, robust technical capabilities and resources, holistic change management offerings, a high degree of human awareness, and strong commitment to customer success.

Reading an IDC MarketScape Graph

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

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

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

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

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Participating vendors offer a full suite of project-based cloud professional services including IT consulting, network consulting and integration, systems integration, and customer application development as defined in *IDC's Worldwide Services Taxonomy, 2022* (IDC #US47769222, July 2022).

Related Research

- *IDC's Worldwide Industry CloudPath Survey, 2023: Insights for Cloud Service Providers in Higher Education* (IDC #US50305523, August 2023)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2023: Higher Education* (IDC #US50304723, August 2023)
- *IDC PlanScape: Cloud Research Computing for Higher Education* (IDC #US50837424, August 2023)
- *Moving to a Cloud-Based Student Information System: A Readiness Checklist for Higher Education* (IDC #US50432323, March 2023)
- *Building a Learner-Centric, Responsive Education Institution* (IDC #US50058723, January 2023)
- *IDC's Worldwide Services Taxonomy, 2022* (IDC #US47769222, July 2022)
- *IDC MarketScape: Worldwide Cloud Professional Services 2022 Vendor Assessment* (IDC #US48061322, April 2022)

Synopsis

This IDC study is a vendor assessment of the 2024 worldwide higher education cloud professional services market. The vendors included in this study are Accenture, Atos, Deloitte, Infosys, Kyndryl, NTT DATA, Presidio, TCS, Unisys, and Wipro. This study is the first known worldwide higher education industry-specific vendor evaluation covering cloud professional services. This research was conducted to provide guidance for higher education IT leaders seeking to partner with a provider that has industry-specific expertise, experience, and capabilities and has demonstrated a deep commitment to serving the needs of the industry.

This research is an independent quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and includes input/feedback from vendors and their customers, as well as publicly available information.

"The higher education industry overall has historically been underserved by the cloud professional services providers," said Matthew Leger, research manager for IDC's Worldwide Education Digital Strategies program. "However, that has changed in recent years as institutions around the globe have sought to accelerate their cloud transformations. In response, many vendors have identified higher education as a strategic growth market and are moving quickly to develop industry-specific expertise and capabilities to better serve the needs of institutions across the globe."

About IDC

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Global Headquarters

140 Kendrick Street
Building B
Needham, MA 02494
USA
508.872.8200
Twitter: @IDC
blogs.idc.com
www.idc.com