

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

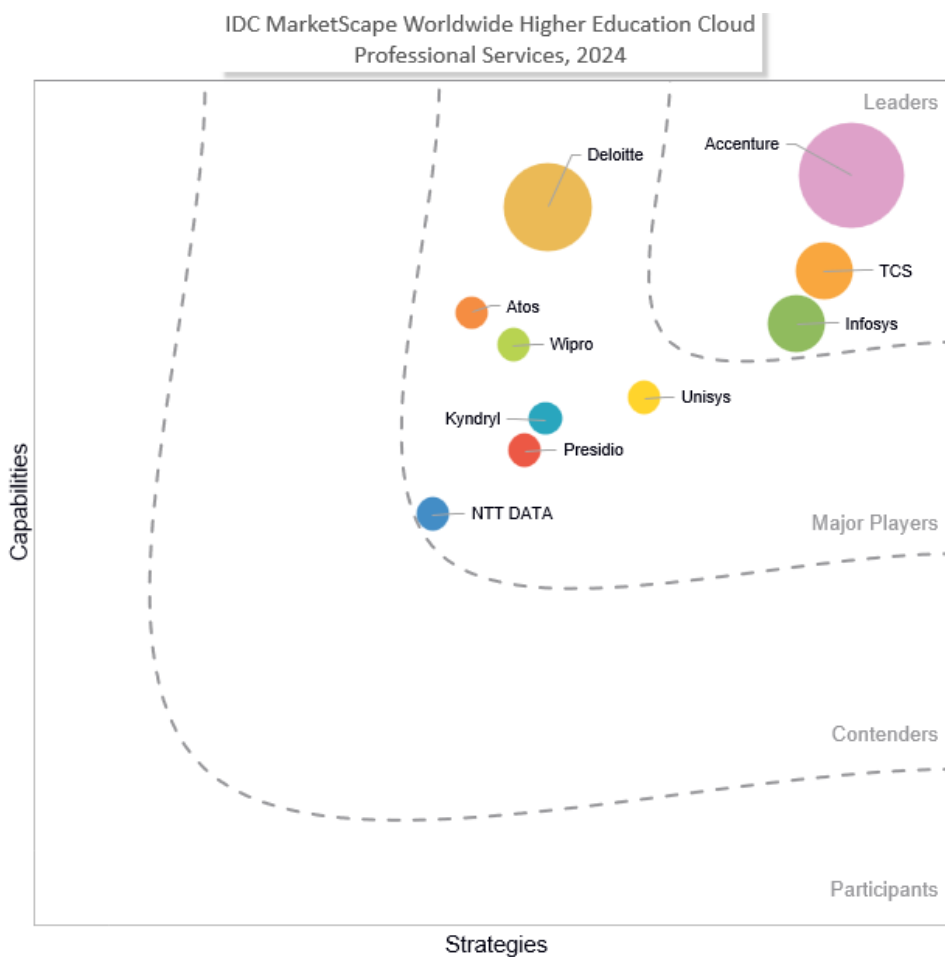
Matthew Leger

THIS MARKETSCAPE EXCERPT FEATURES: TCS

IDC MARKETSCAPE FIGURE

FIGURE 1

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, Advice for Technology Buyers, Featured Vendor 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 simplify 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 MARKETSCOPE 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 provider, 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 MarketScope 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.

FEATURED VENDOR PROFILE

This section briefly explains IDC's key observations resulting in TCS's position in the IDC MarketScape. The description here provides a summary of the vendor's strengths and challenges.

TCS

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

Strengths

- **High-quality delivery with competitive pricing and flexible contracting.** Customers noted that TCS' ability to deliver cloud services at a high quality with competitive price points were key to choosing TCS. Customers also noted that the company's high-quality delivery and competitive pricing also lowered their total cost of ownership and led to significant value for their cloud investments. This makes it a highly attractive option for higher education institutions struggling with limited IT resources and significant cloud transformation needs/goals. In addition, TCS offers flexible contracting options that enable it to support higher education clients with an agile approach (e.g., iterative development, short sprints to develop MVPs and iterate) and to adapt to a client's evolving needs over time (e.g., shifting from onshore to offshore resources mid-project to cut costs and reallocate resources in other areas). Customers note that this flexibility is valuable in situations where it is difficult to accurately develop the project scope in advance and where the desired outcome of the project is not clearly defined. Customers also noted that this flexibility helps reduce the need for time-consuming and disruptive change orders, shift resources around more easily based on project needs, and to "fail fast and fail cheaply" so they can iterate on solutions as they are being developed.
- **Collaborative and responsive customer support.** Customers noted that TCS' client support and consulting teams are very collaborative, working closely with customers to understand the client's unique needs, challenges, and operating environment and develop tailored solutions. Customers noted that TCS' consulting, customer, and technical support teams are highly approachable and proficient at reskilling of the workforce in adopting modern tools and technologies. In addition, with global staffing resources, work can continue outside of the institution's operating hours, which is critical for universities with campuses in different regions of the globe. Last, customers noted that TCS' account managers are well versed with the teams and stakeholders involved, which enables them to quickly connect with the larger TCS ecosystem to get the right support for the customers and resolve project-related matters at faster turnarounds.
- **Ecosystem-driven solution development and co-innovation.** TCS has strong relationships with various industry product and platform players and hyperscalers like Ellucian, Microsoft, Google, AWS, Oracle, and Salesforce. Primarily in a sell-with relationship with these partners, TCS creates joint go-to-market strategies, co-creates industry-specific solutions, and enters the focus geographies to provide systems integration and implementation services and the partners sell their licenses. Two notable initiatives are TCS Cloud Garage, a collaboration with Google to codevelop industry solutions on Google Cloud Platform, and a partnership with Microsoft Azure to bring GenAI capabilities to the higher education sector. In addition, TCS has long leveraged its Co-Innovation Network (COIN) to develop its next-generation industry offerings. COIN is a network of over 2,600 start-ups and more than 50 academic institutions that work together to identify industry disruptors, opportunities, and develop and test innovative offerings. The TCS team notes that COIN is in place to enable continuous innovation and chart a road map for solutions that are three to five years ahead of the market, helping the organization stay ahead of market changes and boost competitiveness in key market segments, including higher education.

Challenges

- **Building industry domain and technical expertise.** While TCS has served the higher education sector for more than two decades, the company's dedicated education vertical has only been in place for three years. Customers noted that the firm still needs to strengthen both its technical expertise (e.g., developing skills and capabilities in industry-specific systems) and operational/business model understanding in the higher education space (e.g., understanding

nuances of different institutional operating models and understanding and navigating complex stakeholder relationships). However, beyond the formation of the education unit, TCS has demonstrated a strong commitment to expanding its higher education business including recent hires of industry practitioners and experts internally, the onboarding of higher education industry advisors in each of its major market geographies, and a big investment in a Ellucian Center of Excellence (e.g., the first major partnership between a systems integrator and a higher education-dedicated ERP and SIS provider).

- **Regional growth/expansion.** TCS has a strong higher education customer base in North America, the United Kingdom, Australia, and India. While it does serve universities in other countries and regions, its industry presence is limited outside of these four areas today. However, with 600,000+ employees in over 150 countries, TCS has global reach and scale that positions it well to reach new higher education markets organically, and the company is committed to serving institutions all over the world as part of its growth strategy.
- **Proof of concept for industry-specific cloud solutions.** TCS has invested heavily in building higher education industry-specific cloud solutions as part of joint go-to-market offerings with hyperscalers and SaaS providers. It also focuses heavily on customer and ecosystem-driven co-innovation to develop industry solutions. However, TCS is still in the early stages of developing, testing, and implementing these solutions in partnership with higher education customers and has work to do to scale its solutions and prove return on investment in the coming years. TCS has also set up an education domain academy for continuous learning and established various industry-specific product alliances and centres of excellence. The TCS Education team notes that it is committed to continuously developing industry-specific solutions for, and serving the needs of, higher education and is determined to continue identifying market opportunities in the "white space" or unexplored areas of the industry. An example of bringing industry focus solutions in higher education is through one of its strategic units, TCS iON, which complements TCS' education domain experience, primarily in the digital assessment and marking space. TCS iON offers end-to-end cloud-hosted solution in a "build as you grow" and "pay as you use" business model. TCS has also built "Connected Scholar" solution using Power Platform on Microsoft Dynamics. The Connected Scholar is a domain solution meant to address institution's student engagement needs.

Consider TCS When

Higher education institutions should consider TCS for cloud advisory, implementation, migration, and managed services when seeking a partner that has demonstrated a deep commitment to co-innovation in the industry, can deliver high-quality cloud services at a competitive price point while offering flexible contracting, and has very collaborative and responsive customer service and support teams.

APPENDIX

Reading an IDC MarketScape Graph

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

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

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

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

IDC MarketScape Methodology

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

Market Definition

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).

LEARN MORE

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."

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