

IDC MarketScape

IDC MarketScape: Canadian Cloud Professional Services 2021 Vendor Assessment

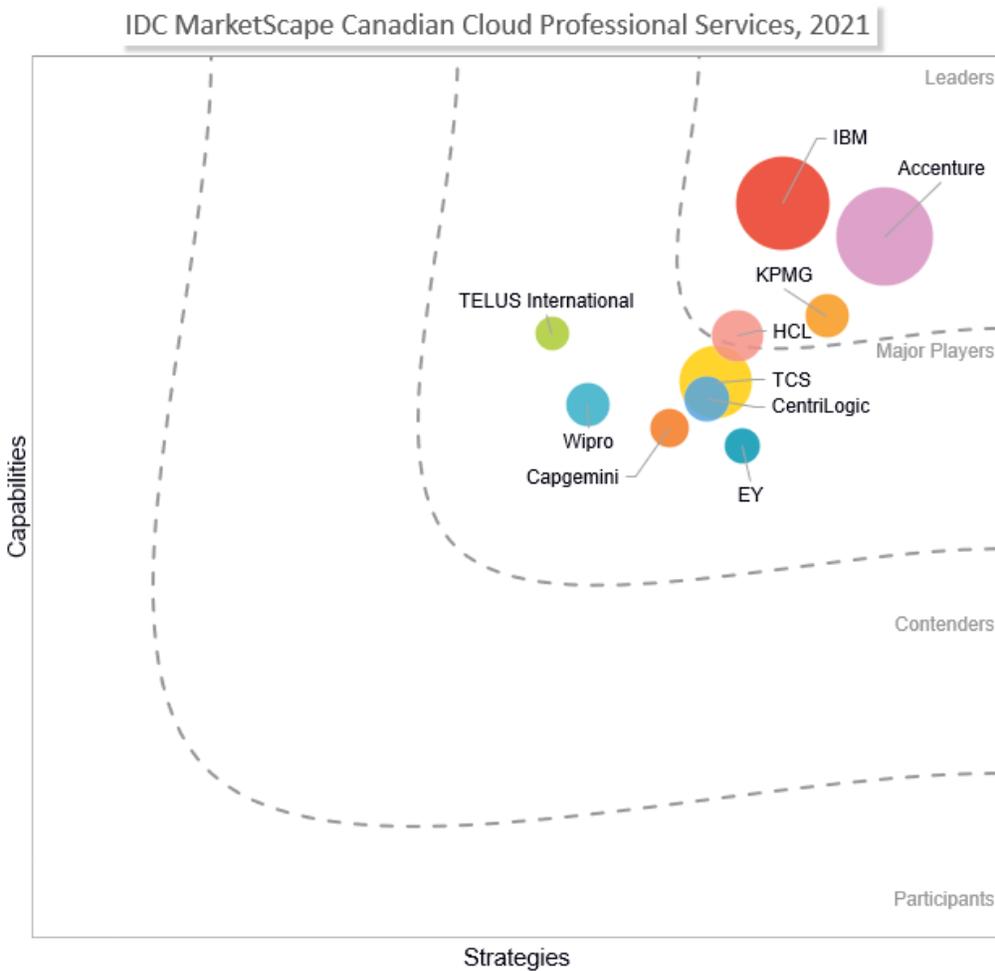
Jason Bremner

THIS IDC MARKETSCAPE EXCERPT FEATURES IBM

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Canadian Cloud Professional Services Vendor Assessment



Source: IDC, 2021

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

IN THIS EXCERPT

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

IDC OPINION

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

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

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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

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

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

ADVICE FOR TECHNOLOGY BUYERS

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

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

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

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

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

Determine Your Cloud Maturity

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

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

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

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

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

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

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

Future of Cloud Is Hybrid

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

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

Size Is Important But Bigger Is Not Necessarily Better

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

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

Apply Governance Framework from IT Outsourcing to Cloud Projects

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

Become a Cloud-Native Enterprise

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

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

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

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

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges. IDC's assessment includes 10 vendors (in alphabetical order): Accenture, Capgemini, CentriLogic, EY, HCL, IBM, KPMG, TCS, TELUS International, and Wipro.

IBM

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

IBM is one of the largest IT and business services firm in Canada. It has more than 5,000 employees in its services units. IDC estimates that approximately 35% of IBM's service revenue is from project-based services, 50% is from managed services, and 15% is from technology support services. IBM is uniquely positioned in that it is also one of the largest technology solutions providers, with extensive offerings in hybrid cloud (including public cloud), AI and analytics, data management, security, middleware, applications, and systems infrastructure. Based on its solutions and services portfolio, IBM Canada is positioning itself as the digital reinvention partner for enterprises and public sector organizations.

Cloud professional services is core to IBM Canada's positioning as the digital reinvention partner, which is predicated on speeding the client journey to hybrid cloud and multicloud environments, transforming customer experience and business workflows through AI and automation, and enabling cost optimization and risk mitigation in the future IT environment. It has service offerings spanning the cloud journey: advise on cloud, move to cloud, build on cloud, and manage on cloud. IBM is very much focused on modernization as part of reinvention, and IBM has continued to invest in method and toolkit improvements to bring IBM Cloud Garage and IBM method and tool evolution to the new IBM Garage Method for Cloud, combining third-party and IBM Research tools to further automate its approaches and stay abreast of client needs. Some of the tools are DReaMAdvisor, an AI-based tool for workload optimization strategy and portfolio analysis; CF Discovery Module for discovery of services running on Cloud Foundry; various code analysis tools; and Red Hat Application Migration Toolkit for replatforming to OpenShift Container Platform. Approximately 35% of IBM's services revenue comes from cloud professional and cloud-managed services.

IBM brings deep capabilities to the Canadian market in terms of personnel and investments. IBM has built practices around Microsoft Dynamics, Microsoft Azure, and Google Cloud – as well as IBM Cloud and Red Hat. Each of these practices have dedicated, certified resources in Canada and globally. IBM has more than 100,000 service practitioners with the cloud skills considered for this IDC study, with

more than 30,000 of them certified on one or more of the major platforms – including more than 7,000 on non-IBM cloud technologies. IDC estimates that IBM has more than 400 resources in Canada certified on Microsoft, AWS, and Google Cloud solutions. In addition to some of the consulting tools previously mentioned, IBM has investments in Canadian delivery centers in Gatineau (for cloud modernization), Montreal (for cloud-native development, AI, and cloud applications), Halifax (for nearshore delivery), and Regina (for infrastructure and application services). IBM also offers managed services to further support clients, including cloud applications, DevOps, multicloud, security and resiliency, and managed infrastructure as a service for clients using a hybrid cloud infrastructure model.

IBM's overriding differentiation in cloud professional services is that it is the only services firm that has a public cloud (i.e., IBM Cloud); an open, multicloud container platform (i.e., Red Hat OpenShift); and automation tools for application development and infrastructure (i.e., Ansible Automation Platform). The cumulative cloud expertise of these technologies, plus the consulting and integration methodologies that can be applied to cloud technologies from other providers, yields a level of cloud expertise that benefits clients on their reinvention journey. IBM also is differentiated by its scale in Canada, with services capabilities stretching from coast to coast. Finally, IBM differentiates itself with its deep understanding of legacy application operations and the know-how to rehost, refactor, and re-architect them for hybrid cloud.

In the professional services space, IBM is positioning itself as a hybrid and multicloud services integrator that enables clients to build secure, scalable, and resilient IT environments that leverage open, cloud-native technologies and modernized enterprise assets that power digital reinvention. IBM's value proposition is that it has depth of experience and capabilities in Canada to be an enterprise organization's trusted partner to guide the journey to the cloud and help the organization manage the journey in the future.

Strengths

IBM's strategy for cloud professional services is well aligned to the Canadian market. IBM has made investments in Canadian delivery centers, including lower-cost nearshore facilities to round out its three-tier delivery model. Its employee strategy to recruit, develop, and mentor employees on its proprietary technologies as well as certifications from other cloud providers ensures that it has depth and variety in its cloud resources. Its offering strategy for hybrid/multicloud, cloud-native development, AI, edge, and other emerging technologies meets the current and future needs of Canadian organizations.

IBM Canada's capabilities are well regarded in the market. Owing to its go-to-market investments and messaging, IBM has high levels of market awareness across Canada. The market has a good impression of IBM's employee management in terms of resource availability and managing turnover on projects. IBM is viewed as cost competitive and for delivering value for money on cloud projects. And buyers also perceive IBM as having a good reputation for customer satisfaction, which was reinforced by clients interviewed by IDC.

Challenges

With respect to cloud professional services, IBM is challenged by its global marketing strategy, which must balance promoting its own IBM Cloud solutions while promoting the independence of its services

around competitor cloud solutions. IBM is also challenged by reports of delivery inconsistency despite its project management and governance processes. In addition, IBM is also challenged by uncertain financial media reports of the company that can influence prospective customers.

Consider IBM When

Consider IBM when you are an organization wanting to work with a partner with national reach, industry depth, and international capability to support cognitive-driven digital transformation that leverages a hybrid/multicloud model with your existing technology assets as you move to a cloud-native environment.

APPENDIX

Reading an IDC MarketScape Graph

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

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

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

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

IDC MarketScape Methodology

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

Market Definition

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

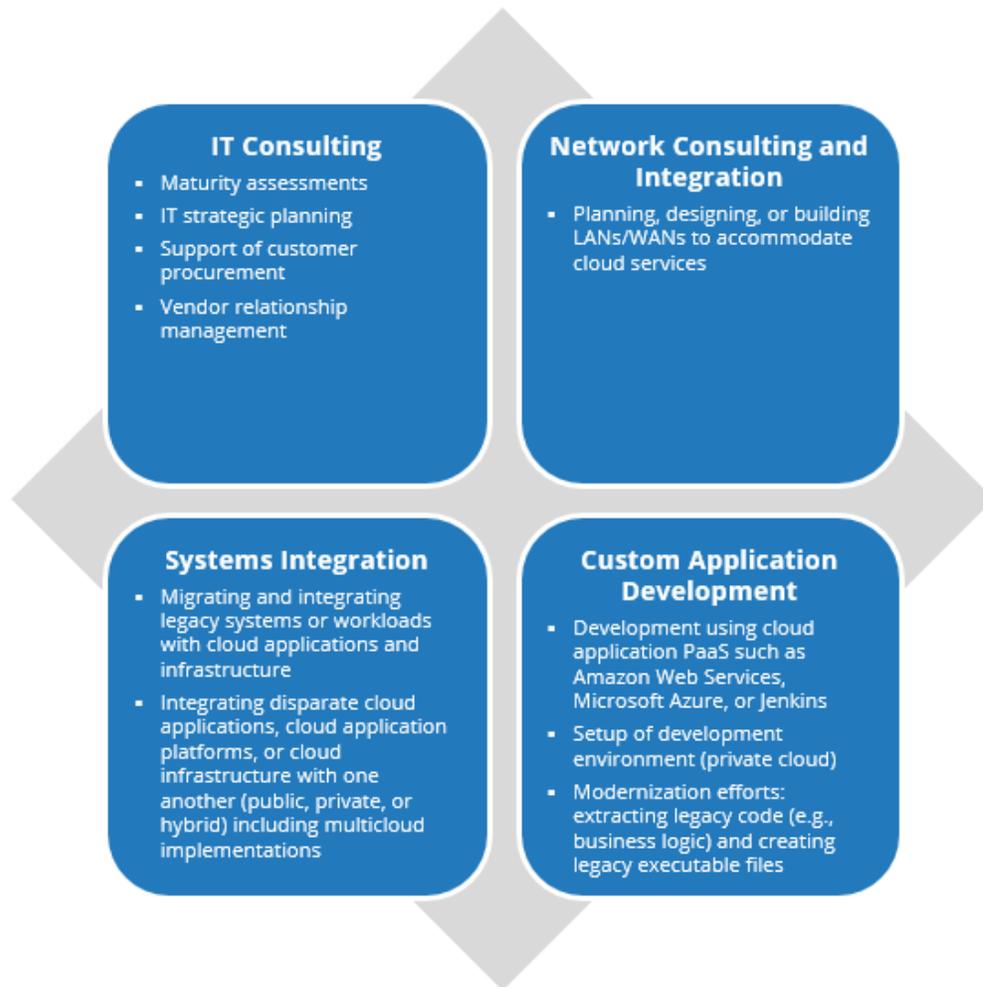
Cloud professional services may include assessments and road map development, workshops and accelerators, implementation of pilot programs or other deployments, and proofs of concept. These solution services may also include assistance in implementation or adoption of cloud services such as SaaS, IaaS,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

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

The cloud professional services market includes elements from four of IDC's services foundation markets, which are defined in their entirety in *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019). Some examples of specific cloud professional services are shown in Figure 2.

FIGURE 2

Examples of Cloud Professional Services



Source: IDC, 2021

LEARN MORE

Related Research

- *IDC MarketScape: Canada Salesforce Implementation Services 2020 Vendor Assessment* (IDC #CA46257720, December 2020)
- *Future of Digital Infrastructure: Ever Faster Delivery of Reliable Digital Services and Experiences* (IDC #US46807920, September 2020)
- *The Path Toward a Cloud-Native Enterprise: PaaS, Cloud-Native Technologies, DevOps, and Developer Centricity* (IDC #US46538720, June 2020)
- *Governing Vendors for Transformation: Getting the Most from Third-Party Relationships* (IDC #US46141620, April 2020)
- *IDC MarketScape: Canadian Datacenter Operations and Management Services 2019 Vendor Assessment* (IDC #CA44463419, April 2019)
- *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019)
- *Cloud Success: Migrate with a Plan to Mature* (IDC #US44883619, March 2019)
- *IDC MaturityScape Benchmark: Cloud Worldwide, 2017* (IDC #US41925016, November 2016)

Synopsis

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

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

About IDC

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

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