

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

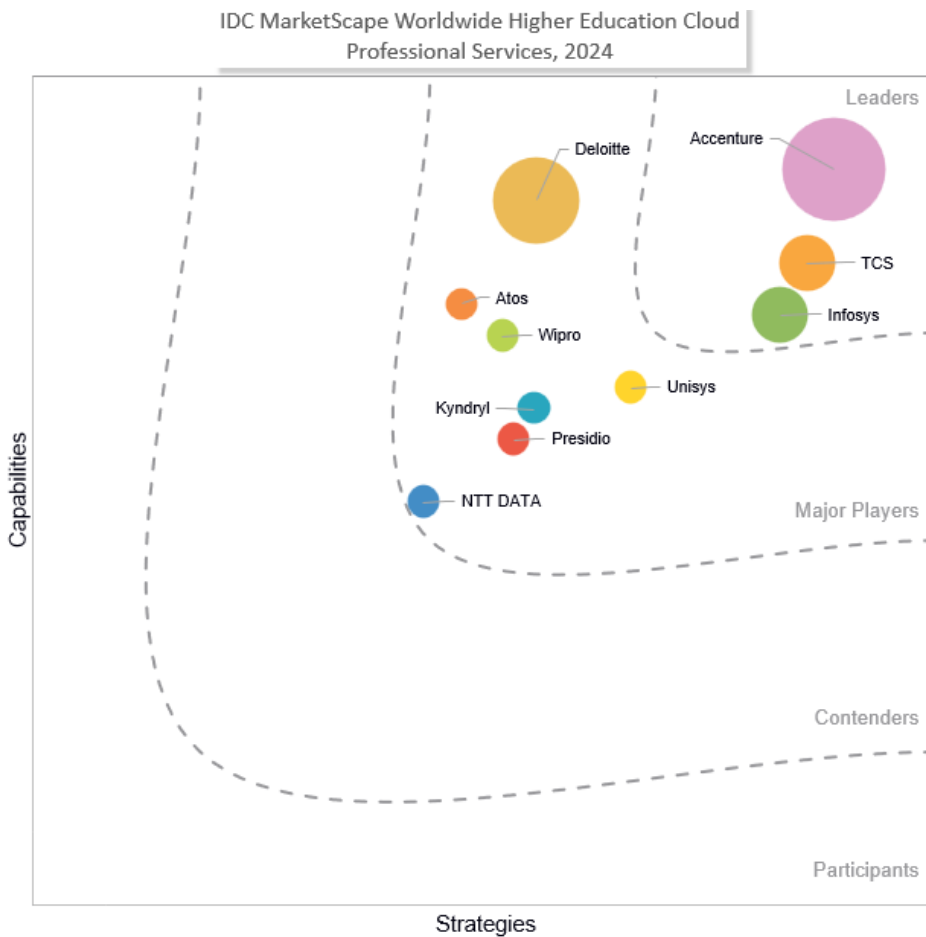
Matthew Leger

THIS EXCERPT FEATURES UNISYS AS A MAJOR PLAYER

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).

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 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 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.

Unisys

IDC has positioned Unisys in the Major Players category in this 2024 IDC MarketScape for worldwide higher education cloud professional services.

Strengths

- **Breadth and depth of cloud service offerings and technical capabilities.** According to customers, a key strength of Unisys' cloud professional services offerings for higher education lies in the breadth and depth of its cloud solutions and technical capabilities. Its offerings include application, data, and hybrid cloud migration, implementation, management, and modernization with a focus on data security and privacy. Its expertise extends to building applications that directly address specific client needs and has built custom digital platforms for elearning, student engagement, faculty collaboration, and academic research, all while ensuring data management, cybersecurity, and compliance. Unisys also offers consulting and advisory services covering needs assessment, design, engineering, deployment, and ongoing management of customized hybrid cloud solutions. Unisys has demonstrated its ability to leverage its deep technical capabilities and understanding of emerging trends to support higher education institutions in their efforts to modernize and integrate modern collaboration platforms, student information systems, learning management systems, and advanced analytics solutions to create administrative efficiencies, reduce costs, enhance information security, improve student engagement and learning experiences, and streamline research processes. Several customers noted that Unisys operates in a "technology-agnostic way" and bring the "right solutions, as well as high-quality technical and human resources to the table," helping meet clients where they are and ensure that they receive solutions that are aligned with their stated goals.
- **Ability to execute complex projects.** Customers noted that Unisys' ability to execute complex projects is a significant strength, highlighting a track record of successfully delivering multifaceted projects on time and on budget, even in the face of aggressive timelines and the need to shift gears based on evolving project scopes or requirements. For example, one higher education customer referenced an effort underway to consolidate nearly two dozen enterprise administrative systems over a one-year timeline with six other major IT projects running concurrently. The client noted that Unisys has so far been successful in its efforts to meet stated deliverables with no unexpected disruptions. Clients explained that Unisys' well-thought-out plans, strong communication, and adaptability allow the company to integrate with client teams to understand the operational environment and IT ecosystem complexities that institutions are operating with and deliver solutions that meet their specific business needs.
- **Trusted partnership and customer success orientation.** According to customers, Unisys has a strong customer success orientation and takes great care to understand client's pain points, goals, and requirements to scope projects and deliver solutions that are aligned closely with stated business objectives. For example, one client with the singular goal of IT cost optimization highlighted that, with Unisys' support, it was able to save millions of dollars by migrating its development environment to the cloud. That same client also highlighted an instance where Unisys proactively developed a plan to negotiate discounts with a cloud service provider even when that was not part of the project scope, helping it to reduce its cloud bill by 15%. On several occasions, customers referred to Unisys as a "trusted" and "embedded" partner that was deeply committed to shared goals around institutional and students' success. Customers particularly appreciated the time and care Unisys took to understand their unique environment and clearly define the goals they wanted to achieve. They also deeply appreciated Unisys' willingness to hold themselves accountable to project outcomes by establishing clear goals/metrics they must deliver on, such as timely incident management or strict delivery timelines to mitigate impact on students, faculty, or staff due to system disruptions or outages.

Challenges

- **Industry/domain knowledge and expertise.** Historically, the higher education sector has not been a strategic focus for Unisys. However, in recent years, Unisys has gained valuable experience working with a range of higher education clients around the world and has begun to invest more heavily in the industry. In the last year, the company hired a new practice lead to stand up a dedicated higher education vertical team and is working diligently to pull in industry and technical resources (including a network of former CIOs and CTOs from industry) to augment its capabilities and build up its expertise. Unisys acknowledged that it has work to do to build up its domain knowledge to effectively serve clients in the industry, but view higher education a strategic growth market and is dedicated to building out its capabilities to capture market share and help institutions achieve their goals.
- **Portfolio of industry-specific cloud solutions.** To enhance its cloud professional services for higher education, Unisys currently leverages strategic partnerships and co-development efforts with partners to build industry-specific solutions or to tailor services to individual higher education clients on a case-by-case basis. The company's strategy for higher education is focused on helping institutions achieve their goals and address their most complex challenges. Specifically, it is focused on five strategic pillars: enhance student experiences that drive student success, enable teaching and learning, empower research, advance security, and elevate institutional resilience. Around these pillars, the company is expanding its capabilities and solutions for higher education, including but not limited to managed cloud services, security services, GenAI and application development services, and virtualized academic labs. Its R&D and innovation strategy for education involves joint solution development and go to market with strategic partners, including AWS and Microsoft Azure where the firm is currently working on AI-driven solution for student enrollment/engagement and research and analytics, respectively. However, the efforts are still in the early stages of development. In addition, Unisys has built a strong portfolio of industry-specific cloud solutions for public sector clients, including state and local government, and has often repurposed those solutions for higher education clients when appropriate. However, it currently has limited offerings for higher education. The Unisys team recognizes this is an area of improvement and currently has plans to build out a suite of customizable and scalable higher education solutions and is working closely with education leaders and technologists to understand how it can better meet institutional needs.
- **Change management.** IDC research has shown that people and organizational change management are greater challenges than technological change management when it comes to cloud implementation. While Unisys offers a range of change management services, customers noted that the company has room to improve on better understanding the motivations and preferences of key stakeholders involved in technology decision-making in higher education to help accelerate cloud transformation. For example, one customer noted that it would like to see Unisys improve its ability to develop stronger business cases for cloud projects and help the customer communicate the value of cloud more effectively to its nontechnical peers and stakeholders. Given the complexities of higher education cultural norms, operating models, organizational structures, and the wide range of stakeholders involved in institutional leadership and decision-making, the firm will need to invest in building its domain knowledge in these areas to enhance its change management capabilities and ensure success in the industry.

Consider Unisys When

Higher education institutions should consider Unisys for cloud implementation/migration when seeking a trusted partner with a strong customer success orientation, breadth and depth of cloud offerings and technical capabilities, and has demonstrated ability to execute complex cloud projects.

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 PlanScope: 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

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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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