IDC MarketScape: Worldwide Datacenter Transformation Consulting and Implementation Services 2016 Vendor Assessment

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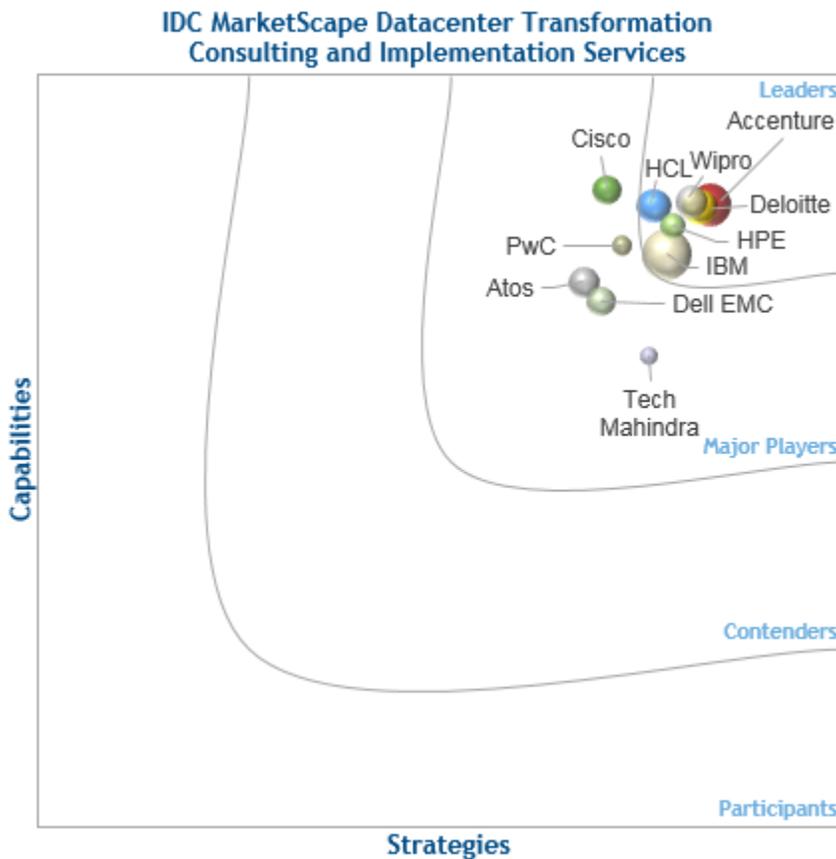
THIS IDC MARKETSCAPE EXCERPT FEATURES: WIPRO

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Datacenter Transformation Consulting and Implementation Services Vendor Assessment

Source: IDC, 2016

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 Datacenter Transformation Consulting and Implementation Services 2016 Vendor Assessment (Doc # US42020516). 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

This IDC study presents a vendor assessment of the 2016 datacenter transformation (DCT) consulting and implementation (C&I) services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate the vendor's ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide DCT C&I services market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing DCT C&I services in both the short term and the long term. A significant component of this evaluation is the inclusion of DCT C&I services buyers' perceptions of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC's macroregions. Key findings include:

- Across all 23 strategies and capabilities assessed, the 3 rated most highly on average across all DCT C&I service providers were "functionality or offering road map," "marketing strategy," and "financial/funding management." The strategy that received the lowest mean scores overall was "sales/distribution strategy."

- On the basis of the survey feedback from 66 of the evaluated vendors' customers, the subcategories "customer service" and "delivery model appropriateness and execution" received the highest aggregate scores. The lowest aggregate score for any subcategory was for "innovation/R&D pace and productivity."

- When buyers were asked what characteristics were required for a DCT C&I services project to be successful at a worldwide level, the top 2 characteristics were the "ability to achieve desired business outcome" and "meet the project timeline."

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of the 11 largest DCT systems integrators (SIs) with broad portfolios spanning IDC's research coverage and with global scale. This assessment is designed to evaluate the characteristics of each firm as opposed to its size or the breadth of its services. Given this approach, Lockheed Martin has been excluded even though it is among the top 5 systems integrators based on the worldwide revenue because the firm typically receives 84% of its revenue from the U.S. government. The inclusion criteria also dictate at least $100 million revenue coming from a vendor's DCT C&I services practice at a worldwide level. Furthermore, at least 10% of revenue and 10% of head count need to be located in each macroregion. In addition, it is conceivable, and in fact the case, that specialty firms can compete with multidisciplinary firms on an equal footing. As such, this evaluation should not be considered a "final judgment" on the firms to consider for a particular project. An enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for an engagement.

ESSENTIAL BUYER GUIDANCE

- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short list vendors for DCT C&I services bids but also evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise, industry based or otherwise.

- **Delivery model appropriateness and customer service.** Include vendor performance on these factors – delivery model appropriateness and customer service – among your highest selection criteria. These factors were the top 2 in terms of importance for project success as rated by customers that were surveyed for this IDC MarketScape.

- **Business outcome and project timeline.** Select services partners for your DCT C&I services engagements that have strong project management and the ability to help businesses achieve desired business outcomes. Successful organizations carried out DCT C&I services projects by partnering with DCT C&I services providers that helped them achieve the desired business outcome they were looking for. It is essential that the investments you put in DCT solutions drive the business outcomes they are planned to achieve, and therefore it will be highly beneficial to partner with a provider that has a reputation to help you achieve these outcomes. Successful organizations also carried out DCT C&I services projects by partnering with DCT C&I services providers that were able to meet the project timelines. Having the ability and discipline to finish a project on time is critical for any successful project-based initiative. Select a partner that can showcase the ability to finish DCT C&I services projects on time.

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 in this section provides a summary of each vendor's strengths, challenges, and opportunities.

Wipro

According to IDC analysis and buyer perception, Wipro is a Leader in the IDC MarketScape for datacenter transformation consulting and implementation services worldwide.

Wipro's DCT portfolio includes consulting, transformation, cloud, and managed services within the company's datacenter and cloud practice, which is built around its BoundaryLess Data Centers (BLDC) framework. Wipro's BLDC framework starts with looking at the business value assessment of digitalizing key vertical-specific processes, conceptualizing the service and infrastructure requirements, establishing a transformation culture, and migrating to the target state, using industrialized low-cost methodologies. Wipro's growth strategy for the company's DCT business is based around the key themes of improving existing technology offerings, growing through acquisition, improving vertical and service line collaboration, developing the partner ecosystem, and focusing on geography-specific opportunities.

Strengths

Buyers rate Wipro highly for leveraging resources globally, managing its staff turnover during a project's lifetime, and achieving the clients' desired business outcomes. IDC rates Wipro highly in terms of its customer service strategy and for the range of its services portfolio.

Challenges

IDC believes Wipro's cost management strategy could be enhanced by offering more proactive accessibility to innovation labs to the customers for new and futuristic solutions. Also, Wipro's financial/funding management strategy could be enhanced by offering more high-value consulting solutions to the company's DCT clients.

Opportunities

According to IDC's 2016 *Global Datacenter Transformation Consulting and Implementation Services Buyer Perception Survey,* Wipro can further enhance its position in future related IDC MarketScape evaluations by improving its client perception in the following areas:

- Implementing new technologies such as IoT, software-defined datacenter, analytics, apps/infrastructure, and virtualization
- Delivering innovation for customers' solutions
- Showcasing its thought leadership

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 a review board 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.

Note: All numbers in this document may not be exact due to rounding.

Market Definition

The datacenter transformation (DCT) consulting and implementation (C&I) services market covers the advisory, assess, plan, design, and build functions of the entire datacenter transformation services life cycle (see Figure 2). For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2016* (IDC #US41098116, April 2016).

FIGURE 2

"Design-Build-Run" Project Scope
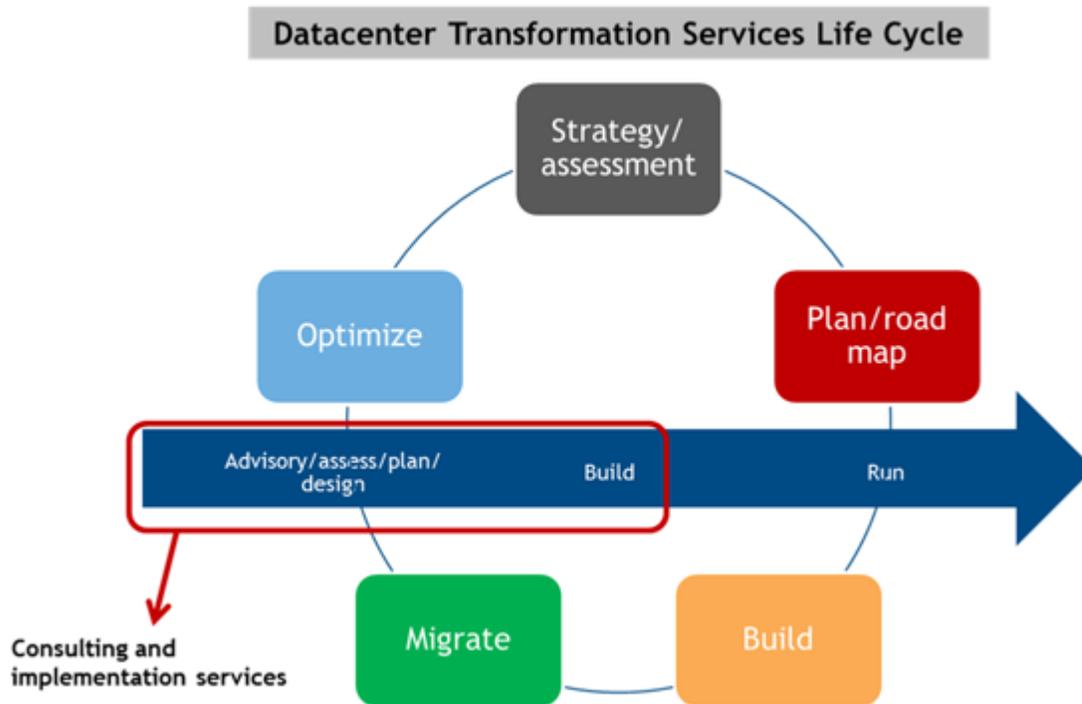
Source: IDC, 2016

LEARN MORE

Related Research

- *Market Analysis Perspective: Worldwide and U.S. IT Consulting and SI Services, 2016* (IDC #US40140116, September 2016)
- *Worldwide and U.S. IT Consulting Services Forecast, 2016-2020* (IDC #US41197915, May 2016)
- *Worldwide and U.S. Systems Integration Services Forecast, 2016-2020* (IDC #US41209315, April 2016)
- *IDC's Worldwide Services Taxonomy, 2016* (IDC #US41098116, April 2016)
- *IDC MarketScape: Worldwide Datacenter Transformation Consulting and Implementation Services 2014 Vendor Assessment* (IDC #252910, December 2014)

Synopsis

This IDC study represents a vendor assessment of the datacenter transformation consulting and implementation services ecosystem through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the ecosystem. This IDC MarketScape covers a variety of vendors participating in the datacenter transformation services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and one another and highlights the factors expected to be the most influential for success in the market during both the short term and the long term.

"With the rapid adoption of hybrid cloud and datacenter virtualization, cloud has become the most critical theme of a customer's datacenter transformation journey," says Ali Zaidi, research director, IT Consulting and Systems Integration Business Strategies at IDC. "Given all of the technical knowledge required to implement a datacenter transformation, the fact that the top project success factor for buyers was nontechnical indicates the balance of business/project management and technical skills that vendors need to have to deliver a successful project," says Chad Huston, research manager, Global Services Markets and Trends.

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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