

# IDC MarketScape: U.S. Federal Government Cloud Professional Services 2024 Vendor Assessment

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## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape U.S. Federal Government Cloud Professional Services Vendor Assessment



Source: IDC, 2024

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

## IDC OPINION

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Cloud supports redundancy, assured workloads, disaster recovery, and business continuity as cloud is the digital infrastructure that is always available to support critical services. As cloud computing environments expand and become more diverse, federal agencies face multiple architectural, development, and deployment decisions and an ever-growing number of cloud services, offerings, and options – for example, what are the best application deployment choices (on premises, off premises), architectural designs (monolithic, macroservices, microservices), and technology foundations (virtual machines, infrastructure as a service [IaaS], platform as a service [PaaS], serverless/function as a service, Kubernetes orchestration systems). To make informed strategies to understand, anticipate, rationalize, and optimize major cloud architecture decisions, agencies often deploy vendors offering cloud professional services.

As defined in *IDC's Worldwide Services Taxonomy, 2022* (IDC #US47769222, July 2022), cloud-related professional services are primarily project-based services. Core cloud professional service providers assist customers with planning and implementing a cloud services strategy. This involves deciding how to adopt the use of public clouds, how to build and implement private clouds, or how to use a hybrid of public and private clouds. Cloud-related professional services may include such services as assessments and road map development, workshops and accelerators, implementation of pilot programs or other deployments, and proofs of concept. These solution services include assistance in the implementation or adoption of all types of cloud services (mixed deployment) such as software as a service (SaaS), infrastructure as a service, or platform as a service, as well as the integration of these services into the customer's IT environment (whether cloud related or noncloud related).

Managing public cloud service costs is increasingly essential not only for multicloud infrastructure but also as more cloud-native, modern application architectures are deployed by agencies. Challenges include understanding complex billing and reporting from multiple cloud providers, getting insights into waste and oversizing, developing accurate cloud expenditure forecasts, and establishing a governance model that covers the life span of cloud infrastructure, platforms, and applications.

IDC evaluated vendors' professional services on the vendors' industry expertise, cloud professional services offering, technical capability, ecosystem, application migration tools and capabilities, and financial operations (FinOps) tools.

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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For this study, IDC evaluates eight vendors based on the inclusion criteria mentioned previously: Accenture Federal Services (AFS), Booz Allen Hamilton (BAH), CGI Federal, Deloitte, General Dynamics IT (GDIT), IBM, Infosys, and SAIC. All these vendors were included because they met the criteria that are described as follows:

- Vendor offers most/all of four project-based cloud professional services in the U.S. federal sector: IT consulting, systems integration, custom application development, and network consulting and integration.

- Vendor has a dedicated U.S. federal vertical team/business unit with professional teams/SMEs, products/services, go-to-market strategy, and cloud offerings specific to the U.S. federal government.
- Participants' 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 also excluded from this study because while they also provide cloud professional services, their dominant strength is not the IT implementation services that are the focus of this evaluation.

## ADVICE FOR TECHNOLOGY BUYERS

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- Note that many vendors are developing tools to automate the expensive and time-consuming aspects of application migration. Consider vendors that invest in tools and platforms that enhance, simplify, and accelerate the migration of applications to cloud.
- Know that speed and time to value are key metrics by which agency IT organizations are measured. Prioritize professional cloud service providers (SPs) that fully leverage their ecosystem partners to provide on-time and budget delivery as well as measurable value from your cloud deployments.
- Consider cloud professional services vendors offering automated tools to prioritize and streamline moving workloads to cloud as well as integrating services and data. Also consider vendors capable of optimizing, through analytics and intelligence management, your hybrid cloud applications.
- Embrace financial accountability for the variable spend model of cloud. Independent management of two or more cloud service providers' cost and billing models may lead to suboptimal cost efficiency. Consider a cloud professional services vendor with the tools and capability to understand and measure price, costs, migration status, and multicloud billing reports – all critical functions for monitoring, analyzing, predicting, scenario planning, and optimizing cloud usage and consumption.
- Understand the costs and challenges of maintaining applications written in legacy languages such as COBOL and FORTRAN and consider vendors with the capability for tool-driven code refactoring for applications that still operate on a dated technology stack yet are mission critical.
- Ensure that the flexibility to place components in the cloud, on premises, and multiple edge locations, as your agency designs workloads and architectures, is key. Consider a vendor that can help you manage these distributed workloads via a common control plane.
- Note that multicloud increases the attack surface due to an increase in complexity. Select a vendor with robust security capabilities to ensure that agency applications, data, and systems are secure before, during, and after migrating to the cloud.
- 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 mission priorities. Leverage these resources to narrow your vendor search and invite a select number of vendors to submit a proposal or provide a briefing.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### Accenture Federal Services

Accenture Federal Services is positioned in the Leaders category in this 2024 IDC MarketScape for U.S. federal government cloud professional services.

#### *Background*

Accenture Federal Services (AFS) is a U.S. company specifically focused on the U.S. federal government's unique requirements and operates as a subsidiary of Accenture PLC with more than 743,000 employees in 120 countries, including more than 199,000 professionals in its Cloud First business unit. Accenture invested more than \$1.1 billion in training and professional development for its staff including training in cloud, data, and AI. Across the company, Accenture holds more than 160,000 cloud certifications across all hyperscalers and several major SaaS providers, and its cloud teams have experience with more than 36,000 cloud projects across industries. The practice's capabilities are augmented and complemented by a partner ecosystem of more than 250 software, hardware, and services companies.

Accenture Federal Services provides integrated cloud, engineering, security, and operations services with specialized mission solutions across the U.S. federal government with more than 13,000 employees across the United States. Its accelerators and delivery approaches are built for the federal cyber and regulatory compliance environment while they federalize Accenture assets to meet fit-for-purpose security, data privacy, control, classification, regulatory, and compliance requirements.

Accenture Federal Services cloud services provide highly scaled cloud modernization and migration, multicloud and FinOps delivery, and edge/IoT solutions to the U.S. federal market. The company's CloudTracker tool is built for federal missions, is appropriations and budget aware, and empowers federal agencies to monitor compliance and utilization, manage risk proactively, enforce accountability, and optimize and reduce costs. Accenture Federal Services builds upon Accenture's capabilities and configures and hardens cloud environments – public, private, hybrid, or air gapped – to meet the U.S. federal government's most sensitive and rigorous security compliance requirements, from FedRAMP to the intelligence community (IC).

#### *Strengths*

Accenture Federal Services focuses on the human side of cloud to help federal government clients migrate, accelerate, grow, and innovate at scale. Feedback from federal clients indicates that the company has strong technical strength, project management skills, and architectural strategy and road maps. The company's Cloud Innovation Lab provides training solutions to help clients transition to the cloud, and it also offers new ideas and innovations to enhance mission delivery and reduce costs.

Accenture Federal Services is known to be exceptional in understanding the federal government and unique requirements of agencies. One agency indicates that "we would not be successful without Accenture Federal Services."

The company has invested in a vast innovation ecosystem with numerous technology partners across cloud, security, and IT markets. Clients also mention the company's robust partner ecosystem, although for some this ecosystem is transparent to the agency as the company provides all points of contact.

The company employs myNav, a platform to accelerate cloud from business case to value realization. myNav helps agencies migrate to cloud, transform business, innovate, and deliver a personalized, predictive omni-channel experience and efficiently operate in the cloud by gaining real-time visibility into financial operations and optimizing spend. CloudTracker is a cloud-agnostic offering built for federal agencies that provide single-pane visibility and oversight of enterprise cloud performance and activity.

Customers frequently noted that the company's wide-ranging experience and domain knowledge in the federal government, coupled with the company's breadth and depth of technical capabilities, were key to the success of the company's cloud projects. Several customers noted that Accenture Federal Services' ability to understand the intricacies and operational complexities, as well as the overall drivers of transformation in the sector, played a role in their selection of Accenture Federal Services. The company has several proprietary prebuilt accelerators that help federal clients get to value faster.

## **Challenges**

While the company receives high praise for communicating with agency enterprises, it could be more proactive in communicating with agency business units, especially when mitigating risks or explaining how cloud-based capabilities may differ from historical systems.

The company is also known for innovation and continuously delivering new capabilities. A word of caution should prevail as agency project managers indicate they must finish the current migration before agency senior management becomes enthralled with new ideas and innovations consistently presented by Accenture Federal Services.

## **Consider Accenture Federal Services When**

- Consider Accenture Federal Services if you are looking for a vendor with end-to-end cloud solutions that include repeatable, automated cloud migration and delivery tools as well as innovative strategy and design with a strategic and deliberate approach to modernization planning and execution.
- Consider Accenture Federal Services if you are a large agency or a mission owner with highly complex and interdependent development, network, and data requirements – like those found with open source processing with analysis or data fusion with large enterprise systems like enterprise resource planning (ERP) or large mission systems like JADC2.
- Consider Accenture Federal Services if you are looking to support the security and performance requirements of highly sensitive national security workloads that require air-gapped or disconnected processing across multiple cloud and edge environments.
- Consider Accenture Federal Services if you want a deep and extensive range of design, business, automation, and technology transformation capabilities, combined with a large bench of consulting talent available.

## **Booz Allen Hamilton**

IDC has positioned Booz Allen Hamilton in the Leaders category in this 2024 IDC MarketScape for U.S. federal government cloud professional services.

## Background

Booz Allen Hamilton (BAH) is a global firm with 32,000 employees, of which 5,900 are skilled in cloud and infrastructure. The company focuses on U.S. federal agencies as well as global commercial clients in industries that include financial services, healthcare, energy, manufacturing retail, and aerospace.

Booz Allen's SmartCloud is a platform of integrated yet modular offerings that ease and optimize the end-to-end cloud journey. SmartCloud solutions are built upon proven accelerators, tooling, and automated patterns and include:

- SmartLift built by Booz Allen and integrated with CAST Highlight accelerates the migration process with a comprehensive and automated analysis for cloud readiness to prioritize, sequence, and address risks before moving complex infrastructures to a multitude of cloud-native environments. SmartLift enables access to modeling, business variables, code analysis, budget estimates, and planning in one dashboard for end-to-end application rationalization, migration road map, and progress tracking.
- SMARTPLATFORM provides cloud-based, as-a-service platforms that enable specialized, purpose-driven mission solutions. This can include solutions such as cybersecurity threat hunting and detection, machine learning operations (MLOps), AIOps, and extended reality/augmented reality (XR/VR).
- SMARTASSIST provides clients access to cloud-native capabilities via differentiated reseller agreements with leading cloud and technology vendors.
- SMARTDIMENSIONS provides telemetry and a "single pane of glass" view for platform health, application health, security compliance, and FinOps across multicloud and hybrid environments.
- SMARTDEFENSE provides comprehensive blueprints for integrated cybersecurity services and capabilities for system protection, access control, monitoring, and compliance with industry cloud security standards and zero trust architecture principles.
- SMARTEDGE provides distributed compute across singular or meshed devices enabling information reasoning and decentralized capability delivery at the tactical edge.
- SMARTFACTORY provides cloud-native, container-based DevSecOps solutions and software factory configuration to accelerate capability delivery.

## Strengths

Booz Allen Hamilton has deep government expertise with a comprehensive suite of cloud professional services offerings and understands agency mission needs. Risk mitigation is a high priority for this company, and clients indicate that Booz Allen has the business-level expertise to manage this risk.

Its Smart suite of solutions enables faster and efficient modernization through integrated, modular solutions built on accelerators, tooling, and automated patterns that reduce friction in migrating workloads to cloud.

The company's government clients indicate that Booz Allen continuously develops and delivers new innovative capabilities. Booz Allen has experts to solve issues when they arise and offers robust security to protect data, apps, and systems before and after cloud migration.

## Challenges

Clients indicate that Booz Allen could be more proactive in anticipating customer challenges and could assist the government IT department in delineating technical capability versus business needs.

In addition, the company could improve integrating services and data as well as helping agencies anticipate and scale up in anticipation of additional usage.

### **Consider Booz Allen Hamilton When**

- Consider BAH if you are looking for a company with deep industry expertise, a suite of cloud migration and life-cycle offerings, as well as automation capabilities.
- Consider BAH if your agencies are planning on large-scale cloud migrations as SmartLift is designed to add clarity to a process that is historically complex and time intensive. And for agencies already operating in cloud-native environments, SmartLift offers a lens to review the portfolio with the ongoing ability to identify opportunities for optimization through emerging multicloud and low-code platforms.

## **CGI Federal**

CGI Federal is positioned in the Leaders category in this 2024 IDC MarketScape for U.S. federal government cloud professional services.

### **Background**

CGI Federal, with 7,000 employees, is a wholly owned subsidiary of CGI Inc., a global organization of 90,500 employees that spans regulated industries and international governments. CGI primarily focuses on providing clients with an end-to-end portfolio of capabilities, from strategic IT and business consulting to systems integration, managed IT and business process services, and intellectual property solutions. A subsidiary of CGI, CGI Federal brings forward lessons learned and innovative solutions from other CGI industry segments. The company drives operational excellence through the CGI Management Foundation, which aligns operations through common principles, processes, and frameworks to provide quality at scale.

CGI Federal has over 45 years serving federal customers with a long history of bringing financial management expertise to agencies. The company enables almost 200 federal organizations to effectively manage their end-to-end financial, acquisition, and budget formulation processes.

The company's cloud professional services span strategy, consulting, modernization, and transformation, leveraging a variety of cloud models and the management of workloads within cloud, multicloud, and hybrid environments. CGI Federal has six core offerings to accelerate the continuous cloud modernization journey:

- **Envision future fit** – Cloud strategy, planning, and architecture advisory
- **Modernize** – IT and application environments
- **Innovate** – Cloud-native development
- **Integrate** – Configure enterprise SaaS solutions
- **Optimize and run** – Cloud governance, management, and operations
- **Turn around** – Fixing urgent cloud challenges

### **Strengths**

CGI Federal clients indicate that the company continuously develops and delivers new innovative capabilities (including those that reduce cost and complexity) to meet their needs. Responsive, Collaborative Digital Architecture (RCDA) is CGI Federal's digital architecture approach. It aligns closely with an agile way of working, transforming the architecture function of organizations across the

federal landscape. RCDA provides a continuous stream of architectural decisions, made step by step to gain control over costs, risks, and uncertainties with a short feedback loop. This approach conducts cost-risk analysis to advise on which automations to integrate within solutions first, which may not be a good fit for automation, and which may be offered as a future cloud-native solution.

CGI's Client Satisfaction Assessment Program (CSAP) enables CGI leaders to meet with client leadership to review program performance, cost control, risk management, and quality control efforts. The company reviews CSAP questionnaires in person and with clients to review candid feedback. CGI Federal leverages the company's Voice of Our Clients (VOC) program along with specific demand from the company's federal business units to focus on service areas for the next two to four years.

CGI has built a library of reusable AIOps and FinOps assets, tooling blueprints, and automation for use across federal engagements. The company leverages these assets to standardize and accelerate cloud integration and app development by using automation in systems development to deliver cost, efficiency, and performance benefits.

### **Challenges**

CGI could do a better job of communicating or "translating" the steps and actions involved in cloud migration to nontechnical agency personnel. This includes providing a nontechnical summary of the cloud strategy road map as well as a checklist of best practices.

### **Consider CGI Federal When**

- Consider CGI Federal if you are looking for a cloud professional services vendor that can support your organization's digital transformation road maps and views architecture as a continuous decision-making process for gaining control over costs, risks, and uncertainties.
- Consider CGI Federal if you are looking for a vendor with a long history of financial expertise.
- Consider CGI Federal if you require network consulting and integration services that include providing broad network access through a variety of service and support models that set up secure network access and infrastructure.

### **Deloitte**

IDC has positioned Deloitte in the Major Players category in this 2024 IDC MarketScape for U.S. federal government cloud professional services.

### **Background**

Deloitte has 100,000 professionals in the United States for all industries. Deloitte is known as a trusted brand for U.S. federal agencies with a broad set of solutions and capabilities. Services range from government digital transformation services (AI, cloud, cyber, and operations integration), CortexAI for Government (a blueprint for enterprise AI/ML in government to enhance decision-making and improve mission outcomes), and cybersecurity services (strategic and cyber-risk). Deloitte also provides deep industry insights and research delivered through the Center for Government Insights to inform its engagements with federal agencies.

Deloitte's cloud professional services approach includes Assess, Migrate, and Modernize and takes agencies through business transformation, encompassing automated engineering, retooling, and reskilling staff; supporting ongoing operations; and prioritizing the future workforce.



Deloitte's Transformation Intelligence is a data-driven change management platform focused on making employees' working lives better while making organizations and their change journeys more human. IntelligentSensing determines an agency's change ambition and helps agencies measure the propensity of people in their organization to change. IntelligentBlueprint designs the change strategy activities and the level of detail required. In the next stage, IntelligentDelivery develops and deploys tailored interventions, and IntelligentSustain evaluates effectiveness to sustain the transformation.

## **Strengths**

The company's Center for Government Insights produces research to help government solve complex problems, and practice leaders also regularly publish thought leadership articles and other content as part of the Deloitte Insights offerings.

Deloitte's CloudBilling 360 is a Deloitte-built generative AI (GenAI) FinOps solution that provides conversational capabilities to enterprises to visualize, optimize, and control their cloud footprint at scale. The company has 180 FinOps-certified practitioners, with 20% average savings per client. CloudBilling 360 can be supplemental to existing FinOps practices or can act as an accelerator to operationalize and optimize cloud spend and serve as a centralized enterprise FinOps platform to drive cloud governance.

Deloitte has a long history of serving U.S. federal government agencies and has demonstrated deep industry expertise. It has made significant investments in industry cloud solutions in recent years. For example, OpenCloud solution is a FedRAMP-compliant environment hosted on government-approved regions to provide dedicated instances, tools, resources, and hosting solutions.

## **Challenges**

While Deloitte offers a robust set of cloud professional services, some customers have noted that their services can be expensive, particularly for smaller and resource-challenged agencies. While Deloitte's customers indicate they get value for their investment, they also indicate they may be able to obtain similar quality services from other vendors at a lower price.

Deloitte's size and organizational complexity may make it challenging to navigate the company's service lines and escalate issues when they arise.

## **Consider Deloitte When**

- Consider Deloitte if you are seeking a firm with deep industry knowledge, diverse industry experience, a broad set of solutions and capabilities, and industry-specific solutions.
- Consider Deloitte if you seek a firm with generative AI for conversational capabilities for quick summarization of cloud financial data in line with ensuring businesses can manage spend more effectively. The firm's CeBee bot utilizes predefined prompts, or agencies can write their own to retrieve extensive information on cloud spend, identifying hidden trends, summarizing results for all personas, and enabling quicker decision-making.
- Note that Deloitte did not actively participate in this vendor assessment.

## **GDIT**

GDIT is positioned in the Major Players category in this 2024 IDC MarketScape for U.S. federal government cloud professional services.

## **Background**

Although known for its history of serving the aerospace and defense communities, General Dynamics IT Inc. also serves civilian agencies. The company has over 30,000 employees across 30 countries worldwide, of which 3,000 are cloud professionals.

General Dynamics IT's (GDIT's) Hive suite of services helps agencies make informed choices regarding moving infrastructure, data, and applications and business services to the cloud. GDIT Hive provides a flexible and secure approach to enable agencies to choose the right cloud for each workload with seamless integration while maintaining control of their sensitive data. Hive solutions include:

- Hive Hybrid Multi-Cloud solution combines the strengths of different cloud providers and agency on-premises infrastructure to create a single, unified environment.
- Hive Management, Automation and Orchestration automates infrastructure management with code, version control, and automated testing. GDIT automates resource provisioning and workflow management across hybrid multicloud environments for faster development, increased productivity, and reduced cost, as well as maintaining and sustaining cloud enterprise services and applications.
- GDIT Hive includes ongoing monitoring and optimization for security and compliance.
- GDIT Hive utilizes FinOps capabilities to optimize IT infrastructure and resources controlling costs, enabling data-driven spending decisions, and delivering enhanced reporting.

## **Strengths**

General Dynamics IT is known for its cloud engineering, strong field engineering skills, and multicloud approach.

The company has strong network consulting and integration capabilities, and the GDIT Technology Shared Services center, Network Operations Center (NOC), monitors and supports expanded cloud-based programs and incident reporting.

General Dynamics IT receives high marks for its security capabilities that ensure that applications, data, and systems are secure before, during, and after migration.

Clients appreciate the company's comprehensive FinOps expertise and the fact that General Dynamics works hard for clients to assist them in managing cloud costs.

The company is flexible and responsive to customer requests and is willing to try new approaches to training, such as microlearning – small units on the immediate or short term, and skills-based initiatives to assist agencies in aligning employees to program objectives.

## **Challenges**

The company is not as well known by civilian agencies for its capabilities in cloud professional services. And while the company understands the federal government well, it may want to ensure that all project personnel understand the uniqueness of an individual agency.

Clients indicate that all initiatives may not be on time and on budget. The company aligns changes in customer priorities with required cloud architectural changes but could communicate better the impact of changes to existing timelines and budgets.

## **Consider GDIT When**

- Consider GDIT if you need an integrated multicloud platform from multiple vendors and a company that provides comprehensive FinOps with many guardrails.
- Consider GDIT if you need to modernize and update back-office systems and seek strong engineering skills.

## **IBM**

IDC has positioned IBM in the Major Players category in this 2024 IDC MarketScape for U.S. federal government cloud professional services.

### **Background**

IBM has over 288,000 employees and provides global hybrid cloud and AI and consulting expertise. In 2022, IBM acquired Octo, an IT consulting and technology company focused on AI, DevSecOps, cloud and infrastructure modernization, data management and analytics, cybersecurity, and low code/no code to enhance its digital transformation services for the U.S. federal government. This acquisition helps complement IBM's modernization consulting services, including the IBM Garage method.

IBM Garage helps accelerate the move of IT infrastructure and applications to cloud, ensuring applications and services can be deployed and managed where it makes the most sense. IBM provides insights, automation, and integration within an agency's cloud provider ecosystem.

The IBM Consulting migration and modernization portfolio covers a broad spectrum of the application landscape, including custom-built and commercial off-the-shelf applications; packaged applications, such as SAP, Oracle, and Microsoft Dynamics; custom industry applications; and analytical applications and data.

IBM Consulting Cloud Accelerator is an automation tool for modernization tasks that streamlines cloud adoption with prebuilt expert rules, playbooks, and starter code. This tool is aligned with hyperscalers and Red Hat and provides prebuilt architecture patterns with associated delivery and estimation models. It optimizes the path to modernization by enhancing user experience, embedding sustainability, and increasing uptime and productivity.

### **Strengths**

IBM is a trusted brand, with deep industry expertise, and has a long history of supporting diverse and complex agencies in the U.S. federal government. The company has a strong focus on the governance, risk, and compliance (GRC) needs of government agencies, as well as other heavily regulated industries.

The company quickly ramped up a meaningful practice around Red Hat to address the hybrid cloud opportunity. IBM's container platform, with Red Hat at the core, manages and scales infrastructure with speed and flexibility and continues to gain clients.

The IBM Transformation Index: State of Cloud is designed to help agencies advance their cloud-enabled transformation journey. This index provides the leadership team with a view of where their organization actually sits versus where they may think it sits, and often, there is a gap.

IBM is deeply focused on security at all stages of cloud migration journeys and takes seriously its responsibility in protecting sensitive agency and citizen data as well as systems integrity. The

company has a robust set of cloud security offerings, including migration security and data protection capabilities across government devices, applications, and databases.

IBM's continuous migration approach, delivered by IBM Consulting Cloud Accelerator, has built-in automation at each stage of a cloud migration, which can accelerate cloud migration efforts and reduce implementation costs. These automation capabilities support rehosting and workload migration for data, image, application, and storage migration, as well as database rehosting and mass migrations.

## **Challenges**

IBM customers cite high cost/pricing as a challenge for their organizations, especially agencies with limited IT resources. While IBM has robust automation capabilities to help reduce costs of implementation, customers noted that up-front costs can be reduced by streamlining contract negotiations/procurement and placing a greater focus on improving up-front planning to reduce risk of project disruptions and better ensure on-time, on-budget delivery of cloud implementation projects.

IBM customers noted that it can be a challenge to get timely support when technical issues arise. IBM's size and complex organizational structure may make it difficult to escalate problems and reach needed technical support quickly.

## **Consider IBM When**

- Consider IBM if you are looking for a trusted brand with deep industry expertise, robust security offering, and a company highly skilled in using open source technologies for increased efficiency and cost savings.
- Consider IBM if you require automation capabilities, including custom-built and commercial off-the-shelf applications; packaged applications, such as SAP, Oracle, and Microsoft Dynamics; custom industry applications; and analytical applications and data.
- Consider IBM if you are seeking to modernize mainframe environments through the adoption of cloud-native development models to modernize existing capabilities incrementally.
- Consider IBM if you are seeking to deploy containers as the preferred destination for hybrid cloud applications.

## **Infosys**

Infosys is positioned in the Contenders category in this 2024 IDC MarketScape for U.S. federal government cloud professional services.

## **Background**

Infosys has 336,000 employees globally across all industries. Infosys has 25,000 employees in the United States for all industries. Infosys Public Services is a United States-based subsidiary of Infosys, and exclusively works with North American public sector organizations.

Infosys helps organizations accelerate cloud journey through Infosys Cobalt, a set of services, solutions, and platforms that enable cloud-powered enterprise transformation. Infosys Cobalt with 35,000 cloud assets and over 300 industry cloud solution blueprints helps organizations redesign the enterprise, from the core, and build new cloud-first capabilities to create seamless experiences in public, private, and hybrid cloud, across PaaS, SaaS, and IaaS landscapes. Infosys Cobalt includes:

- Infosys Cloud Management Platform is a unified cloud management platform that helps clients manage their multicloud and hybrid cloud.
- Infosys Cloud Insights Platform is a cloud monitoring and analytics platform that provides clients with an understanding of their cloud performance. The platform collects and analyzes data from all cloud environments, and it provides clients with a single view of their cloud performance across all metrics, including availability, performance, and security. Infosys Cloud Insights is FedRAMP authorized.
- Infosys Cobalt Labs leverages design thinking to incubate ideas, cocreate prototypes, and establish frameworks.
- Infosys Cloud Assurance is a suite of services that helps clients ensure the security and compliance of their cloud environments. Infosys Cloud Assurance includes services such as cloud security assessments, cloud compliance assessments, and cloud penetration testing. Infosys Cloud Assurance is FedRAMP authorized.
- Infosys Live Enterprise Suite is a cloud-based platform that can be used to create and manage custom dashboards. The platform also provides several prebuilt dashboards that are specifically designed for government agencies.
- Infosys Cobalt Cloud Community is an enterprise cloud community designed to help enterprises drive innovation at scale and includes business and technology practitioners across Infosys. This community works from the grassroots level upward across industries, organizations, and functions and technologies to develop reusable cloud assets that can be applied to securely solve everyday business challenges.

## **Strengths**

The company's clients indicate that Infosys has technical depth and expertise with a comprehensive suite of cloud professional services offerings to meet a wide range of needs. These services include cloud planning, cloud migration, cloud application development, and cloud managed services.

Infosys receives high marks for its robust security capabilities to ensure applications, data, and systems are secure.

The company's key programs include a change management component to ensure adoption of the new cloud systems. This may also include access to the Infosys learning platform, Infosys Wingspan, for clients looking to reskill their teams on new technologies.

## **Challenges**

Infosys has been targeted in its approach to the U.S. federal government market, and it focuses on a select few agencies, thus is not well known in the U.S. federal government market. While the company is known for technical depth and translating needs into technical solutions across multiple markets, its understanding of federal government business processes, mission needs, and goals could improve.

Given Infosys' targeted approach, the firm provides guidance to a few select agencies regarding key legislative/policy mandates and Executive Orders that impact federal agencies and their deployment of cloud professional services but is planning to deepen the company's understanding of the unique needs of the U.S. federal government and build a stronger portfolio of U.S. federal government-specific solutions.

## Consider Infosys When

- Consider Infosys if your organization is considering updating legacy back-office systems such as customer relationship management (CRM), human capital management (HCM), and enterprise resource planning (ERP) systems and moving apps such as recruitment, sourcing, partnership management, and strategic planning to cloud.

## SAIC

IDC has positioned SAIC in the Leaders category in this 2024 IDC MarketScope for U.S. federal government cloud professional services.

### Background

SAIC is a technology integrator with a substantial and long-standing presence in the federal market. SAIC has approximately 24,000 employees and focuses primarily on the U.S. federal market. SAIC delivers cloud solutions and application development and modernization in secure hybrid cloud environments, as well as outcome-based enterprise IT as a service driving modernization and transformation. These solutions are supported by core technologies such as engineering services systems, including engineering, model-based systems engineering, modeling, and simulation, and IT and technical services including IT operations and maintenance of existing systems and network operations across the IT stack.

SAIC CloudScend is a family of adaptable and modular solutions designed to help government agencies manage, modernize, and migrate their workloads to the cloud faster, with reduced risk and maximum value. CloudScend's three core solution domains – explore, transform, and operate – address cloud migration, management, and optimization, delivering secure and transformative cloud environments using automation tools and processes. The CloudScend life cycle consists of:

- **Explore:** SAIC assesses the as-is state and, in collaboration with the customer, develops a cloud strategy with a target architecture and security objectives. This includes a plan for migrating applications and workloads to a desired state that aligns with the customer's cloud and business goals.
- **Transform:** SAIC makes applications and workloads cloud ready and moves them to the cloud through automated tools. This can be a single application, multiple applications, or a customer's entire portfolio. SAIC offers pre-integrated solutions designed with government cloud challenges in mind. The development of automation tools often requires a large data set and experience, and SAIC uses its experiences in federal cloud migration to help automate future projects through these pre-integrated solutions and authority to operate (ATO) automated provisioning that can enable innovation at the optimum price, speed, securely.
- **Operate:** The CloudScend Management Platform provides unified cloud operations logically, insulating cloud SP differences. This platform also provides efficient catalogue-driven provisioning via DevSecOps models. Cloud management services include daily operations and maintenance activities, via anything/everything-as-a-service (XaaS) or managed services models that are flexible for clients. CloudScend Secure Network Management provides multicloud network service delivery, diagnostics, and operations, as well as zero trust-aligned network security. CloudScend FinOps provides a "single pane of glass" view with a control panel that provides details on all cloud infrastructure and apps deployed and costs – all by day, by month, by cloud provider, by department/agency, by application, and by region.

## Strengths

SAIC's clients indicate that the company goes beyond expectations, is flexible and adapts to agency changes, and provides proactive, cost-effective advice. Agencies indicate that SAIC takes the time to understand business needs and provides fit-for-service solutions.

The company is also known for having a high degree of security knowledge.

SAIC's Continuous ATO (C-ATO) Accelerator provides a robust governance, risk, and compliance solution, designed with agency requirements in mind. This solution streamlines and increases auditability, speeds up cloud adoption, and reduces costs by reducing work for skilled staff in addition to automating and orchestrating authorization processes.

By providing pre-integrated solutions and ATO-automated provisioning, the company helps agencies remove obstacles in cloud migration and operations and assists agencies in migrating and optimizing applications quickly and at scale.

CloudScend FinOps provides a "single pane of glass" view with a control panel that provides details on all cloud infrastructure and apps deployed and costs – all by day, by month, by cloud provider, by department/agency, by application, and by region.

## Challenges

When communicating about strategy with clients, the company could be more proactive, for example, by having the SAIC project team offer more open and clear direction of how and when changes will take place.

Client feedback indicates that the change request process should be in place before the project is implemented.

## Consider SAIC When

- Consider SAIC if you are looking for a trusted brand with deep industry expertise, speed of application development and deployment, and continuous ATO capabilities.
- Consider SAIC if you seek a vendor with robust security capabilities to ensure a zero trust approach to your cloud migration and applications, data, and systems are secure before, during, and after cloud migration.
- Consider SAIC if comprehensive FinOps tracking is critical for understanding cloud spending, reducing the risk of overspending, and highlighting variances in spend.
- Consider SAIC if a timely ROI on cloud migration is required.

## APPENDIX

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### 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 participants and participants' reference clients. 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 agency 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).

## **Strategies and Capabilities Criteria**

The capabilities axis focuses on the capabilities of the company and products and services offered today. In 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.

The strategies axis focuses on high-level strategic decisions and underlying assumptions about offerings, customer segments, business, and go-to-market plans. Under this category, analysts look at whether a supplier's strategies in various areas are aligned with customer requirements (and spending) over a defined future time (see Tables 1 and 2).



**TABLE 1****Key Strategy Measures for Success: U.S. Federal Government Cloud Professional Services**

Strategies Criteria	Definition	Weights (%)
Domain strategy	Assessment of the vendor's plans to grow industry expertise and build domain knowledge	20.00
Portfolio strategy	Assessment of the firm's U.S. federal government vertical strategy, including plans to build industry-specific cloud solutions that complement and augment the firm's existing capabilities and offerings	25.00
Total cost of ownership (TCO) strategy	Assessment of the firm's plans to reduce TCO for customers by providing tools that assist in migration, automation, and cost estimates	10.00
Customer satisfaction strategy	Analyst and customer assessment of the vendor's ability to collaborate with customers to shape strategic road map and overall offerings	10.00
Functionality or offering strategy	Analyst and customer assessment of the vendor's ability to evolve the vendor's cloud services offerings to address evolving customer needs in U.S. federal government	10.00
R&D pace/productivity	Analyst and customer assessment of the vendor's overall R&D and forward-looking innovation strategy	7.00
Growth strategy	Analyst assessment of the vendor's growth strategy in the vendor's industry business unit	10.00
Ecosystem strategy	Analyst and customer assessment of the vendor's partnership ecosystem strategy in the industry	8.00
Total		100.00

Source: IDC, 2024

**TABLE 2**

**Key Capability Measures for Success: U.S. Federal Government Cloud Professional Services**

Capabilities Criteria	Definition	Weights (%)
Domain knowledge	Analyst and customer assessment of the firm's industry domain knowledge/expertise	10.00
Industry solutions	Analyst and customer perception of the vendor's ability to build, implement, and support industry-specific cloud solutions; assessment of a range of existing U.S. federal solutions that the vendor has brought to market	20.00
Functionality or offering	Analyst and customer assessment of the firm's breadth and depth of CPS offerings (including adjacent services such as consulting and managed services) and the firm's ability to tailor offerings to the needs of U.S. federal agencies across the services life cycle	10.00
IT FinOps tools	Analyst and customer assessment of the firm's ability to assist agencies understand and manage the variable costs of IaaS, PaaS, and SaaS	12.00
Project execution	Assessment of the vendor's ability to deliver services on time and on budget and with the highest quality and professionalism	5.00
Customer satisfaction	Overall customer satisfaction with the vendor's services	10.00
Innovation	Assessment of the vendor's R&D investment tied to cloud professional service offerings; customer perception of strength of innovation capacity of the vendor	5.00
Industry growth	Assessment of the vendor's presence and growth trajectory in the U.S. federal government market	8.00
Ecosystem	Assessment of the vendor's existing partner ecosystem orchestration of cloud service providers (e.g., Microsoft, AWS) and SaaS vendors (e.g., Salesforce, Workday) and their alignment with the U.S. federal government market	5.00
Security	Assessment of the vendor's cloud security tools and services tailored to unique security requirements of U.S. federal government	5.00
Change management	Assessment of the vendor's change management offerings to support clients through their cloud transformation, as well as outcomes achieved through change management by U.S. federal agencies	10.00
<b>Total</b>		<b>100.00</b>

Source: IDC, 2024

## LEARN MORE

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### Related Research

- *IDC MarketScape: Worldwide Higher Education Cloud Professional Services 2024 Vendor Assessment* (IDC #US49968823, January 2024)
- *IDC FutureScape: Worldwide National Government 2024 Predictions* (IDC #US50296223, October 2023)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2023: National Civilian Government* (IDC #US49229623, August 2023)
- *Governments Anticipate That Generative AI Will Impact Employee Work Transformation* (IDC #US51121923, August 2023)
- *2023 CloudPath Survey: Trends and Challenges in Federal Agencies* (IDC #US50303123, August 2023)
- *IDC PlanScape: Leveraging AI to Address the Skills Gap in Federal Agencies* (IDC #US50308423, June 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 of U.S. federal government cloud professional services for 2024 is an independent quantitative and qualitative assessment of eight vendors based on their industry expertise, cloud professional services offering, technical capability, ecosystem, and application migration tools and capabilities. This research is based on input/feedback from vendors and their customers, as well as publicly available information. Vendor profiles include Accenture Federal Services, Booz Allen Hamilton, CGI Federal, Deloitte, GDIT, IBM, Infosys, and SAIC.

"As cloud computing environments expand and become more diverse, federal agencies face multiple architectural, development, and deployment decisions and an ever-growing number of cloud services, offerings, and options," says Adelaide O'Brien, research vice president, IDC Government Insights. "This document compares potential providers across key criteria that align with federal agency mission priorities," she adds.

## 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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