

IDC MarketScape

# IDC MarketScape: Canadian Managed Multicloud Services 2024 Vendor Assessment

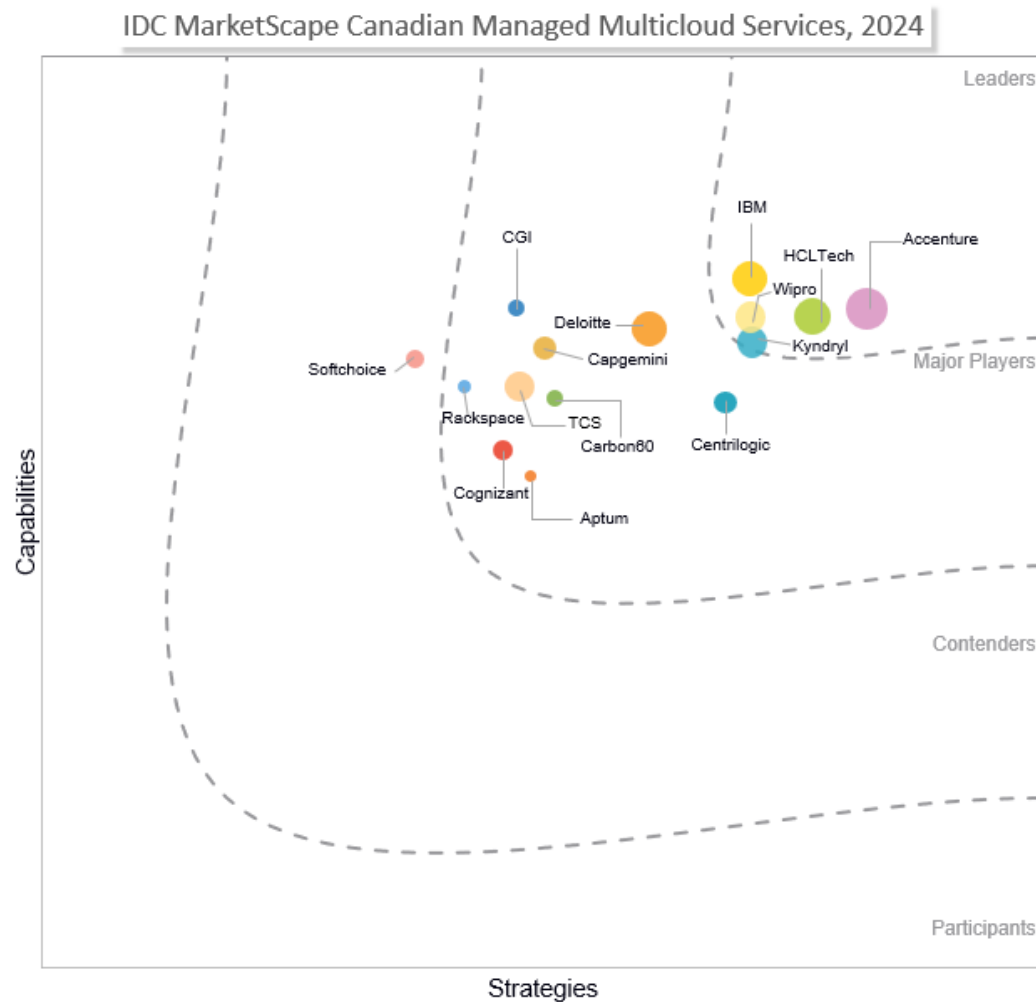
Jason Bremner

THIS MARKETSCAPE EXCERPT FEATURES: HCLTECH

IDC MARKETSCAPE FIGURE

FIGURE 1

## IDC MarketScape Canadian Managed Multicloud Services Vendor Assessment



Source: IDC, 2024

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

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Canadian Managed Multicloud Services 2024 Vendor Assessment (Doc #CA50302123). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Advice for Technology Buyers, Featured Vendor Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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This IDC study represents a vendor assessment of IT services firms providing managed multicloud services in the Canadian market through the IDC MarketScape model. It covers a variety of vendors including managed service providers (SPs), global systems integrators, and Canada-based firms. This research is a quantitative and qualitative assessment of many characteristics that buyers consider when selecting a managed cloud 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 a survey of 301 IT buyers on characteristics that are key to successful managed cloud service engagements. In addition, each of the 301 IT buyers evaluated one vendor they currently used or are familiar with on the vendor's capabilities. The IT buyers were sampled from organizations with more than 100 employees across Canada. Key findings from the evaluation are:

- Vendors are using similar strategies to grow their cloud practices. All are investing in service automation and intellectual property (IP), employee development and customer support, cloud-native technologies and methodologies, and partner ecosystems. Some 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 to not only short-list vendors that appear to meet your needs but also investigate how a vendor is building on the strengths identified and how it is addressing its challenges.
- There are many vendors active in the managed cloud services space in Canada today. This IDC study assessed vendors that met the six 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 managed cloud services as an individual vendor may have the specific expertise required for the engagement. Some of them are listed in the Vendors to Watch heading. IDC advises IT buyers to balance their requirements for best-of-breed expertise and general capabilities when selecting a managed cloud 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

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The scope of this IDC MarketScape includes providers that offer managed services involving public cloud services (infrastructure as a service [IaaS], platform as a service [PaaS], systems infrastructure as a service [SaaS]), dedicated cloud services (also called private cloud), and hybrid cloud computing environments from multiple cloud providers. IDC considered more than 25 vendors of such offerings in

Canada to be included in this IDC MarketScape. IDC collected and analyzed data on 15 service providers that met our inclusion criteria. For inclusion in this IDC MarketScape, the vendor had to meet six criteria:

- **Revenue.** Minimum of \$15 million annualized revenue from managed cloud services
- **Managed multicloud services coverage.** Must support either or both of the following for clients: two or more public cloud providers and/or hybrid clouds used by a client (combining dedicated/private and public)
- **Technology coverage.** Focusing on managing cloud platforms, that is, a combination of integrated cloud infrastructure/laaS (compute, storage network), PaaS, and SaaS that supports digital operations
- **Number of public cloud partners.** Minimum of two public cloud providers spanning laaS, PaaS, and SaaS, such as AWS, Microsoft, Google Cloud, IBM Cloud, OVHcloud, and Oracle
- **Life cycle of services.** The ability to offer end-to-end services, from modernizing (e.g., architecting, developing/migrating) to ongoing management and support
- **Canadian presence.** Must have an active Canadian go-to-market and delivery presence for managed cloud services

## ADVICE FOR TECHNOLOGY BUYERS

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The digital business era dawned before the COVID-19 pandemic, but the impact on business, society, and the economy arising from that experience accelerated initiatives to deliver digital products and experiences as routine yet essential elements of business today. Successful digital businesses require operations to connect customers, employees, and partners with mission-critical data and applications in a secure, agile, and scalable manner. Digital operations need a digital infrastructure that encompasses interconnected compute, storage, network, and management resources deployed across datacenters, colocation and hosting sites, edge locations, and public cloud platforms and services. Multicloud is inherent to digital infrastructure as the myriad of resources cannot be provided by one technology vendor.

Public cloud adoption is a key indicator for the state of digital infrastructure, and IDC found that public cloud adoption has become mainstream due to the pandemic. 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 laaS. 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 June 2023, IDC surveyed Canadian organizations and found that 66% of organizations have adopted PaaS and 51% of organizations have adopted laaS. Organizations that are more advanced from a digital business perspective are even more likely to adopt PaaS, indicating the importance of PaaS in digital infrastructure.

While cloud adoption has steadily grown, cloud maturity among Canadian organizations has not kept pace. In March 2020, 52% of Canadian organizations with more than 100 employees were still in the two lowest levels of IDC's cloud maturity model, 26% of Canadian organizations had matured to the third level (out of a total of five levels), and 22% of Canadian organizations had achieved the highest two levels. As of June 2023, 62% of organizations with 100-999 employees and 45% of organizations with 1,000+ employees remain at the two lowest levels of cloud maturity. Enterprise organizations are making headway in cloud maturity, but improvement is needed. Since IDC started monitoring cloud maturity among Canadian organizations in 2014, 40-50% of Canadian organizations consistently aspired to reach the top 2 levels of cloud maturity in three years in each survey. However, they never

achieved their aspirations. IDC believes major factors underlying this situation are internal cloud skills and technical debt of IT investments.

Many organizations were able to “move” to the cloud but they are getting less value from the cloud without fundamental changes to their ongoing IT operations. As firms expand the use of cloud resources, they are facing an increasingly daunting task of ensuring that they not just can maintain control but also can orchestrate the development, deployment, and management of these resources effectively. Consequently, many managed SPs are positioning themselves as having the right balance of resources and capabilities to help firms meet these challenges.

IDC is seeing continued use of external service providers because of the acceleration of cloud adoption and to augment internal skills as Canadian organizations move to, and operate in, the cloud. IDC survey from late 2023 found that more than 40% of Canadian organizations are planning to sign new service contracts for managing IaaS or PaaS or private cloud environments in 2024. 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 technology buyer 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 services firms providing managed and professional cloud services. What skills do you have, and what do you need to execute your strategy? Organizations that have been slow 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 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 services provider can help pinpoint the obstacles to overcome and accelerate your cloud 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 services 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 (CCOE) to bring internal expertise together.

## Scale Is Important But Providers of All Size Can Offer Value

This IDC MarketScape examined a broad range of providers addressing the managed multicloud services needs of enterprise customers. IDC could have assessed many more providers as there are many firms in Canada providing managed cloud services, but they did not meet all our inclusion criteria. 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.

## Get Access to the Right Talent

The breadth of technical skills to support a multicloud environment is constantly expanding and changing. The types of talent span encompass the four dimensions (vision, technology, people, process) that drive a cloud journey. Technical expertise can involve a wide array of existing and new technologies (hardware and software) and delivery platforms (IaaS, PaaS, SaaS) from new types of service providers (e.g., AWS, Azure, Google, IBM Cloud, ServiceNow, salesforce.com). People and process expertise is needed to support new processes, such as DevOps, continuous integration/continuous delivery (CI/CD), and site reliability engineering (SRE). In addition, process expertise is

needed to implement operational excellence that includes the use of advanced automation (cognitive/AI) in orchestrating across all these resources. When it comes to buyers of managed multicloud services, firms expect that managed SPs be able to provide them with the right resource at the right time in the right location with highly skilled talent across any of those expertise areas. In addition, firms expect that a managed SP be able to find resources outside its organization, such as with partners or potentially crowdsourcing, to fill any gaps that the managed SP might have. In addition, enterprises are increasingly expecting that the managed SP helps train the client's employees on how to utilize these new types of cloud capabilities. Essentially, enterprises are looking for a managed SP that creates a team environment in which the client is part of the team and can learn with the managed SP.

## Examine Vendor's Approach to Multicloud Management

Enterprises are learning through the implementation of cloud capabilities (private, public, hybrid) and the use of cloud service providers, that becoming fluent in utilizing cloud resources requires a new approach to IT and new sets of tools and technologies. The following are four key areas in which managed SPs need to invest to create this new approach to managing IT using cloud capabilities:

- Managed SPs need to take a long-term approach to making critical investments at the beginning of an engagement to avoid potentially costly mistakes down the road. While this may seem counterintuitive in a world that moves faster, better strategic planning will likely yield creating the standards, frameworks, and blueprints that will both minimize or eliminate defects in a process or technology solution and help streamline operations.
- Managed SPs should focus on supporting multicloud management that involves embedding processes that can enable continuous and rapid change (e.g., DevOps, CI/CD, SRE), which ultimately requires both creation of standards and integration of the life cycle of services from architecting and developing to deploying and managing cloud resources.
- Managed SPs should be flexible enough to support any cloud technology solution and resource that increasingly involves an expanding universe of cloud service providers across IaaS, PaaS, and SaaS.
- Managed SPs should be able to implement robust governance for meeting compliance, costs, quality of service, and utilization of resources with the aid of a managed multicloud set of tools and platforms (e.g., single pane of glass).

## FEATURED VENDOR PROFILE

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This section briefly explains IDC's key observations resulting in HCLTech's position in the IDC MarketScape. The description here provides a summary of the vendor's strengths and challenges. HCLTech was assessed on 65 individual criteria, including 22 criteria examining its strategies for managed multicloud services and 43 criteria examining its capabilities in this area.

### HCLTech

HCLTech is positioned in the Leaders category in the 2024 IDC MarketScape for Canadian managed multicloud services.

HCLTech is a publicly traded, India-based multinational IT professional and managed services company with a business strategy to help clients build enterprises for the digital business era. HCLTech has operations in more than 60 countries and more than 224,000 employees globally.

HCLTech has more than 6,000 employees working on Canadian client engagements, including approximately 1,600 resources in Canada. HCLTech has been in Canada since 2009, but it has seen accelerated growth beginning in 2019 when it established a global delivery center (GDC) in Moncton, New Brunswick, and added GDCs in Vancouver, Edmonton, and Mississauga since then. GDCs and innovation labs are important to HCLTech's delivery strategy, with 100+ innovation labs and 210+ delivery centers globally. HCLTech focuses on several industries in Canada, including telecommunications, financial services, retail and consumer goods, and energy and utilities.

The managed cloud services strategy of HCLTech is based on its CloudSMART portfolio, which is a set of offerings and capabilities that span the full life cycle of services from consulting and design services to build and manage hybrid, multicloud environments. The portfolio of CloudSMART capabilities includes more than 100 industry solutions that are driven by intelligent automation, AI, industry compliant and zero trust architecture, and 20 different types of horizontal offerings spanning multiple types of technologies. HCLTech has created dedicated business units for key partners, including AWS, Microsoft, and Google. HCLTech also offers professional and managed services in applications, cloud-native development, product engineering, horizontal and industry-specific business processes, security, analytics, AI, and automation.

HCLTech has extensive capabilities in managed multicloud services in Canada. Approximately 70% of the company's clients in Canada use HCLTech's managed cloud services, and the majority of them use multiple public cloud providers simultaneously. Approximately 65% of HCLTech's Canadian workforce support managed cloud service engagements. And more than 90% of its resources are trained and certified in at least one popular public or private cloud technology partner solutions, with Microsoft Azure being the most common, followed by AWS, Google Cloud, SAP Business Technology Platform, Red Hat, Salesforce Platform and/or MuleSoft, and others. HCLTech's certifications with alliance partners include being a Microsoft Azure Expert Managed Service Provider, an AWS Managed Service Provider, and a Google Cloud Premier Partner. 45% of HCLTech's Canadian multicloud clients also use dedicated private cloud solutions. HCLTech's managed cloud service revenue mix in Canada is evenly balanced between infrastructure and middleware/applications. To support HCLTech's cycle of cloud services, the company has also invested heavily in proprietary automation, frameworks, and accelerators to drive accelerated cloud journeys and operational excellence, including microservices and containerization, data and productivity, and AI and automation (notably its DRYiCE portfolio).

HCLTech differentiates itself in managed cloud services through its intellectual property solutions, its partner-specific value creation plays, and its cloud-driven service propositions for digital transformation. Investments by HCLTech in 100 industry and 20 horizontal solutions, its frameworks and models like Noesis for AI and Nexus for design thinking, and its 50+ COEs and innovation labs like MetaLabs and Q-Labs showcase its capabilities and accelerate time to value for clients. HCLTech has cocreated value creation plays with specific cloud partners, such as a migration factory to move ISV applications to Microsoft Azure; automating SAP migration to Google Cloud; VelocITy, a software-defined infrastructure offering with Cisco; and a program to aid clients exit datacenters and migrate all workloads to AWS. The plays are designed to create enhanced value to clients and differentiate HCLTech from other providers. HCLTech's service propositions for cloud-driven digital transformation journeys also is a differentiator. HCLTech has developed three service propositions: innovation led (focusing on cloud as the innovation platform), sustainability led (focused on reducing carbon footprint through cloud operations), and productivity led (focused on improving operational resilience and/or reducing cost).

HCLTech's positioning in multicloud services is an end-to-end partner for continuous cloud modernization. HCLTech's value proposition to clients is to be a long-term partner in helping them

become a resilient digital enterprise. HCLTech's services business is based on a relatively smaller number of long-term, broad scope client engagements, and it has grown to more than 50 clients across Canada. Much of its cloud professional services business is with these same managed service clients for additional scope of services. HCLTech is also highlighting its decade-long commitment to the Canadian market and its deepening investments in Canada, especially at the grassroots level with local communities and educational institutions, as well as 20+ Canadian start-ups. Ultimately, the value proposition of HCLTech's CloudSMART strategy is to maximize business value, reinvent the customer experience, modernize the digital core, drive continuous innovation, develop a comprehensive cloud culture, and create a sustainable future.

## **Strengths**

HCLTech's strategy for managed multicloud service is closely aligned with the Canadian market. HCLTech's innovation capabilities, delivery strategy, and offering portfolio have combined to fuel the company's strong revenue growth in the market. Investments by HCLTech in its cloud management platform and IP portfolio illustrate its innovation strategy. Its delivery strategy to have three-tier delivery model in Canada and to address a range of cloud layers and technologies addresses the needs of enterprise clients. Its offering strategy provides clients benefits because of its range of services and its investment in MSP certifications in multiple cloud providers.

From a capabilities perspective, HCLTech's service portfolio has all the essential capabilities to modernize infrastructure and applications to the cloud and provide ongoing management and also has adjacent value-added managed services. HCLTech has competencies in most emerging cloud technologies, supports major container platforms, and has sound edge computing capabilities. It has large resource pools in Canada and globally, and its Canadian resources are known to have good industry and business process expertise.

## **Challenges**

HCLTech has grown in Canada in revenue via acquiring new clients and growing existing ones as it has increased its strategic focus on Canada. Yet the level of market awareness of HCLTech and the awareness of its range of services is limited in Canada. Investments to raise awareness could further help in the acquisition of new accounts in the market. HCLTech can increase its momentum through amplified messaging to the market about its strategy and capabilities.

## **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 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

The focus of this 2024 IDC MarketScape for Canadian managed multicloud services is to study and assess managed SPs that support managed multicloud services, which are a subset of managed cloud services. Managed cloud services involve a provider performing ongoing management and/or optimization activities for a client's public cloud, private cloud, or hybrid cloud environment (see *IDC's Worldwide Managed Cloud Services Taxonomy, 2022*, IDC #US48523822, June 2022). Specific focus is technology stack up to the application layer (i.e., IaaS, PaaS, and SaaS). This IDC MarketScape excludes vendors that only support one public cloud provider as the objective of the study is to understand the landscape of providers that are capable of providing services from multiple cloud technology vendors at the same time.

## LEARN MORE

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### Related Research

- *Who in the C-Suite Drives Early Contract Renewals of Managed IT Services in Canada?* (IDC #CA50193923, November 2023)
- *Why Do Canadian Organizations Not Use Managed IT Services Today?* (IDC #CA49332123, November 2023)
- *Market Analysis Perspective: Canadian Managed Cloud Services, 2023* (IDC #CA50194023, September 2023)
- *Worldwide Managed Cloud Services Forecast, 2023-2027: An Extraction View of Technology Outsourcing Services Markets* (IDC #US50028423, August 2023)
- *IDC PeerScape: Practices to Drive Value from Managed Multicloud Services* (IDC #US48742222, January 2022)
- *IDC MarketScape: Worldwide Managed Multicloud Services 2021 Vendor Assessment* (IDC #US45977020, October 2021)
- *IDC PeerScape: Lessons Learned from Using Cloud Professional Services in Canada* (IDC #CA46275521, March 2021)
- *IDC MarketScape: Canadian Cloud Professional Services 2021 Vendor Assessment* (IDC #CA46215320, January 2021)

## Synopsis

This IDC study represents a vendor assessment of the providers offering managed multicloud services to the Canadian market through the IDC MarketScape model. It covers a variety of vendors including global and Canada-based firms. The research is a quantitative and qualitative assessment of many characteristics that buyers consider when selecting a provider of managed multicloud services. This evaluation is based on a comprehensive set of parameters important to meeting the customer's current and future needs for managed multicloud services. This IDC MarketScape covers 15 vendors participating in the Canadian market.

“Many Canadian organizations are expanding their use of cloud resources from multiple cloud providers that involve different cloud deployment models and cloud platforms (IaaS, PaaS, and system infrastructure as a service). This is creating greater complexity for enterprises to effectively manage the performance of all their IT resources and investments and is impeding their cloud maturity and evolution to digital businesses. The situation is leading many Canadian organizations to consider engaging with a service provider for managed cloud services,” according to Jason Bremner, research vice president, Worldwide Services, IDC Canada. “Prospective technology buyers of managed multicloud services within Canadian organizations should carefully consider which provider's strategies and capabilities best fit their needs and use the assessments of the vendors in this IDC MarketScape to develop a short list of suitable providers.”

## 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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