The Forrester Wave™: Enterprise Architecture Service Providers, Q1 2015

by Henry Peyret and Gordon Barnett, March 19, 2015

KEY TAKEAWAYS

The EA Service Provider Market Is Growing As EA Pros Look For Trusted Partners

The EA service provider market is growing largely because EA professionals increasingly trust their providers to act as strategic partners, helping them with either traditional EA services or advanced services that enable them to gain new capabilities.

PwC, Tata Consultancy Services, Wipro Technologies, Deloitte, And Infosys Lead The Pack

Forrester’s research uncovered a market in which PwC, Tata Consultancy Services, Wipro Technologies, Deloitte, and Infosys lead the pack. EY, Cognizant, Tech Mahindra, and Capgemini offer competitive options. HCL Technologies lags behind.

Advanced EA Services Are Key Differentiators In The EA Service Provider Market

Most EA service providers are good at delivering traditional EA services, such as staff augmentation and architecture deliverables. Advanced services, such as business process design and digital strategy, differentiate the providers the most.

Access The Forrester Wave Model For Deeper Insight

Use the detailed Forrester Wave model to view every piece of data used to score participating vendors and create a custom vendor shortlist. Access the report online and download the Excel tool using the link in the right-hand column under “Tools & Templates.” Alter Forrester’s weightings to tailor the Forrester Wave model to your specifications.
The Forrester Wave™: Enterprise Architecture Service Providers, Q1 2015

The 10 Providers That Matter Most And How They Stack Up

by Henry Peyret and Gordon Barnett
with Alex Cullen and Alex Kramer

WHY READ THIS REPORT

In Forrester’s 25-criteria evaluation of enterprise architecture (EA) service providers, we identified the 10 most significant service providers — Capgemini, Cognizant, Deloitte, EY, HCL Technologies, Infosys, PwC, Tata Consultancy Services, Tech Mahindra, and Wipro Technologies — in the category and researched, analyzed, and scored them. This report details our findings about how well each service provider fulfills our criteria and where they stand in relation to each other to help EA professionals select the right partner for their EA program.

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Forrester conducted service evaluations in December 2014 and interviewed 10 service providers: Capgemini, Cognizant, Deloitte, EY, HCL Technologies, Infosys, PwC, Tata Consultancy Services, Tech Mahindra, and Wipro Technologies.

Related Research Documents

Select A Right-Fit Tool Set For EA
December 22, 2014

Market Overview: Enterprise Architecture Services 2014
December 2, 2014

Designing Your EA Operating Model And Organization
October 3, 2014
DIGITAL BUSINESS IS DRIVING DEMAND THAT EA TEAMS STRUGGLE TO MEET

Digital business transformation is increasing the demands placed on enterprise architecture (EA) programs. The need to respond to these demands without increasing the number of permanent staff is leading some EA executives to turn to EA service providers. These providers can help in two ways:

- **Augmenting the EA team’s capacity.** EA service providers can help by providing traditional EA services, such as workforce development, maturity assessment and improvement, and technology-focused architecture deliverables.

- **Bringing in new thinking and methods.** Service providers can also offer capabilities that address the new needs of customer experience, product innovation, and digital transformation. Advanced EA services range from redesigning business processes and operating models to assisting with product innovation and digital strategy to improving technology management performance.

The EA Service Provider Market Consists Of Four Different Provider Types

The EA service market is a crowded, $4 billion market, with more than 80 companies offering EA services. However, this represents less than 1% of the broader $477 billion IT consulting and systems integration market.1 The EA service market has four major provider types:

- **Multinational consultancies.** These firms serve the largest companies both globally and locally, thanks to their multinational presence. Their EA practice is only one of the numerous services they provide to their global customers, and their EA services are often part of larger transformation projects. This segment accounts for more than $3 billion of the EA service market.

- **Regional and specialist providers with niche capabilities.** There are many regional EA service providers serving midsize and large companies. Most have the capabilities to support multinational companies but lack the resources to engage with firms outside their region. Some of these players have developed their own IP or mix of competencies to address niche capabilities, such as EA for Agile and DevOps, and to differentiate themselves from the multinational consultancies. Examples include act Consulting (GmbH), Arismore, Citizant, Cornerstone Consulting, Fabrici Management Consulting, Hunter Communications LLC, Oresys, Real IRM Solutions, Searchlight Consulting, Shift Technologies, and Smart Architects. This segment accounts for approximately $570 million in revenue.

- **EA tool vendors.** Several tool vendors offer consulting services to help companies adopt EA practices; they often frame these around tool implementation. In addition, they all have specific areas of strength for EA programs: For example, BizzDesign helps firms looking for Archimate support; Mega offers EA and risk governance services; Avolution supports IT performance; and The Salamander Organization provides MoDAF support. The revenues of this market segment total less than $100 million.
**Boutiques.** These are often very small consultancies that center on their founder and deliver training and coaching on their own intellectual property (IP) and associated methodologies. Boutiques offer some of the most innovative thinking for EAs, which is particularly useful for advanced EA groups looking for new ways of solving difficult issues. Examples include Kevin Smith of Pragmatic EA; Jaap Schekkerman at the Institute For Enterprise Architecture Developments; Tom Graves of Tetradian; and Art Caston of ProACT. The total revenue of these boutiques is less than $10 million.

**ENTERPRISE ARCHITECTURE SERVICE PROVIDER EVALUATION OVERVIEW**

To assess the state of the EA service provider market and see how the providers stack up against each other, Forrester evaluated the strengths and weaknesses of the top 10 multinational consultancies: Capgemini, Cognizant, Deloitte, EY, HCL Technologies, Infosys, PwC, Tata Consultancy Services (TCS), Tech Mahindra, and Wipro Technologies (see Figure 1). These providers have size, geographic presence, and vertical coverage, as well as the broadest array of services. All of these providers are agnostic when it comes to EA tools. We also invited Accenture, Atos, and IBM to take part, but they declined to participate in this evaluation.
### Inclusion criteria

Companies evaluated in this category must:

1. Offer services to global clients.
2. Provide multiple EA service offerings.
3. Develop their own IP beyond the usual TOGAF and/or DoDAF frameworks.
4. Clearly separate their EA service from other service offerings on their website.

This Forrester Wave evaluation excludes EAMS tool vendors that offer EA services.

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**Advanced EA Services Are Key Differentiators In The EA Service Provider Market**

Through our evaluation, we found that:

- **All of the providers are good at delivering traditional EA services.** If you only need traditional EA services, all of the service providers can help. You will find that they support different frameworks — most commonly TOGAF, FEAF, MoDAF, and DoDAF — and some providers have developed their own methodologies and frameworks that go further than TOGAF currently does. You can use these differences to discriminate among the providers, but it’s the value and experience of the consultant that is most important, not the value of the framework.
Advanced EA services are the key differentiators. If you need one of the advanced EA services, you will find greater differences among the providers. They all have their own methods for these advanced services, with the exception of the use of Lean and Six Sigma for business process optimization. EA leaders looking for help should ask the providers to clearly explain their approach.

Providers commonly embed advanced EA services in bigger consulting offerings. Our research revealed a paradox: Advanced EA services make a difference to your mission, but the best providers won’t offer you these services outside a broader consulting project — preferring to embed them into strategic business transformation projects. That means that most of the largest EA service providers want to sell the complete delivery of larger initiatives in which EA is only a part. If you are looking to develop your own EA practice based on these advanced EA services independent of a large transformation project, be prepared to negotiate with the multinational consultancies or take a look at the regional and specialist service providers.

Evaluation Criteria Assess Current Offerings, Strategy, And Market Presence

After examining past research, user need assessments, and vendor and expert interviews, we developed a comprehensive set of evaluation criteria. We evaluated vendors against 25 criteria, which we grouped into three high-level buckets:

- **Current offering.** The current offering criteria focus on vendor capabilities in client satisfaction, vertical experience, and the two types of services — traditional and advanced. Traditional EA services include EA workforce development, training, coaching, and mentoring; establishing or renewing an EA program; business and IT strategy alignment; application portfolio management and rationalization; infrastructure cost and/or quality improvement; and information architecture. In the advanced EA services category, we evaluated providers’ offerings for business process improvement; innovation management through EA; digital transformation; business portfolio road mapping; business operating model redesign and optimization; and business performance management and continuous improvement. Current offering scores are depicted on the vertical axis of the Forrester Wave.

- **Strategy.** The strategy criteria assess each provider’s EA service offering strategy, corporate strategy, pricing strategy, and marketing. We also provide high-level pricing information. Forrester’s assessment of each company’s product and corporate strategy is subjective; the other scores are based on data. Strategy scores are depicted on the horizontal axis of the Forrester Wave.

- **Market presence.** The market presence criteria include the total number of clients; the total resources dedicated to EA services; the type of engagements; the total revenue from EA services; and the growth in EA services. The Forrester Wave’s market presence scores do not measure market share and should not be used as a proxy for such estimates. Market presence scores determine the size of the circle surrounding each vendor’s dot on the Forrester Wave.
EVALUATION ANALYSIS

The evaluation uncovered a market in which (see Figure 2):

- **PwC, TCS, Wipro Technologies, Deloitte, and Infosys lead the pack.** In our evaluation, PwC presented an impressive suite of traditional, advanced, and vertical EA services. TCS has strong traditional EA services but lags behind in terms of advanced EA services. Wipro is very strong in areas related to technology and information strategy. Deloitte excels in traditional EA services, business process and operating model redesign, as well as performance improvement. Infosys excels in business process improvement and performance improvement.

- **EY, Cognizant, Tech Mahindra, and Capgemini offer competitive options.** All the providers do well at delivering traditional EA services; some also offer strong advanced EA services, while others lag behind the Leaders. EY excels in business process improvement, operating model redesign, and performance improvement; it also offers broad vertical coverage. Cognizant excels in infrastructure strategy and establishing an EA practice. Tech Mahindra excels in business process improvement, digital transformation, and business portfolio road mapping. Capgemini excels in innovation management and operating model redesign.

- **HCL Technologies lacks advanced EA service offerings.** HCL Technologies is fairly strong in traditional EA services but its advanced EA services clearly lag behind. If you are launching a new EA program from scratch with a very traditional approach, HCL remains a good provider.

This evaluation of the EA service provider market is intended to be a starting point only. We encourage clients to view detailed product evaluations and adapt criteria weightings to fit their individual needs through the Forrester Wave Excel-based vendor comparison tool.
**Figure 2** The Forrester Wave™: Enterprise Architecture Service Providers, Q1 ’15

Go to Forrester.com to download the Forrester Wave tool for more detailed product evaluations, feature comparisons, and customizable rankings.

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**Figure 2** The Forrester Wave™: Enterprise Architecture Service Providers, Q1 ’15 (Cont.)

<table>
<thead>
<tr>
<th>CURRENT OFFERING</th>
<th>Forrester’s Weighting</th>
<th>Capgemini</th>
<th>Cognizant</th>
<th>Deloitte</th>
<th>EY</th>
<th>HCL Technologies</th>
<th>Infosys</th>
<th>PwC</th>
<th>Tata Consultancy Services</th>
<th>Tech Mahindra</th>
<th>Wipro Technologies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client satisfaction</td>
<td>25%</td>
<td>3.00</td>
<td>4.00</td>
<td>4.00</td>
<td>0.00</td>
<td>2.00</td>
<td>5.00</td>
<td>4.00</td>
<td>2.00</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td>Traditional EA services</td>
<td>25%</td>
<td>4.50</td>
<td>3.67</td>
<td>4.83</td>
<td>3.83</td>
<td>3.67</td>
<td>4.67</td>
<td>4.67</td>
<td>4.00</td>
<td>3.83</td>
<td></td>
</tr>
<tr>
<td>Advanced EA services</td>
<td>25%</td>
<td>3.33</td>
<td>2.33</td>
<td>4.00</td>
<td>3.33</td>
<td>2.00</td>
<td>3.67</td>
<td>4.67</td>
<td>3.33</td>
<td>3.00</td>
<td></td>
</tr>
<tr>
<td>Vertical experience</td>
<td>25%</td>
<td>3.00</td>
<td>3.00</td>
<td>3.00</td>
<td>5.00</td>
<td>3.00</td>
<td>5.00</td>
<td>5.00</td>
<td>5.00</td>
<td>5.00</td>
<td></td>
</tr>
</tbody>
</table>

| STRATEGY | 50% | 2.10 | 3.30 | 3.30 | 3.00 | 2.85 | 3.65 | 4.00 | 4.10 | 2.95 | 4.55 |
| EA service offering strategy | 30% | 1.50 | 2.00 | 3.00 | 2.50 | 3.00 | 4.00 | 5.00 | 5.00 | 3.50 | 5.00 |
| Corporate strategy | 25% | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 5.00 | 4.00 | 5.00 | 4.00 | 5.00 |
| Pricing strategy | 30% | 2.00 | 5.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 | 2.00 | 5.00 |
| Marketing | 15% | 2.00 | 3.00 | 5.00 | 4.00 | 2.00 | 4.00 | 4.00 | 3.00 | 2.00 |

| MARKET PRESENCE | 0% | 2.33 | 2.75 | 3.33 | 1.75 | 1.92 | 1.58 | 3.25 | 4.17 | 0.58 | 1.92 |
| Client base and engagements | 50% | 2.67 | 3.00 | 3.67 | 2.00 | 2.33 | 1.67 | 3.00 | 3.33 | 0.67 | 2.33 |
| Financials | 50% | 2.00 | 2.50 | 3.00 | 1.50 | 1.50 | 1.50 | 3.50 | 5.00 | 0.50 | 1.50 |

All scores are based on a scale of 0 (weak) to 5 (strong).

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**VENDOR PROFILES**

**Leaders Offer Strong Traditional And Advanced EA Services**

Leaders in our evaluation of EA service providers include:

- **PwC.** PwC is a global audit firm with nearly 200,000 employees worldwide and a global EA network of 1,250 employees. PwC positions EA as a core discipline embedded in each of its three offerings: Management, Technology, and Risk and Forensics. PwC has developed its EA practice around its own suite of frameworks, including a transformation life cycle, a strategy framework, an operating model framework, an architecture delivery framework, and industry-specific reference operating models. It helps clients organize and integrate EA services into their existing strategy, operations processes, and governance structure. PwC also provides services to develop target architectures and supporting road maps that help deliver on a firm's strategic objectives.
■ **Tata Consultancy Services.** TCS is a global IT services and consulting company with 300,000 employees, including approximately 1,000 enterprise architects and 500 business architects. EA is a core capability of TCS’s strategy of digital reimagining, business simplification, and business transformation. TCS also delivers specific EA services for business design and improvement and business technology enablement. TCS has developed a proprietary set of EA frameworks (Impact) around the TOGAF and Zachman frameworks. It has also developed specific dashboards (MasterCraft) to help EA decision-makers optimize their services. TCS has tailored its 5D project delivery methodology specifically to the renewal of EA programs.

■ **Wipro Technologies.** Wipro Technologies is a global IT services company with 160,000 employees. It has more than 120 EA consultants delivering EA services across a broad range of verticals. Wipro has developed a clear curriculum for internal practitioners; customers can benefit from this through training. Wipro bases its EA practice on a simplified framework and methodology to cover business, application, information, and infrastructure architectural domains. For each of the three steps in its methodology (understand, plan, and transform), it has developed frameworks and models to accelerate EA value delivery. It also has an interesting capability model to optimize the EA operating model. Wipro’s advanced EA services are less sophisticated than those of other providers, but their simplicity can be an advantage if you are trying to get other stakeholders in your company to understand and agree to EA projects.

■ **Deloitte.** “Deloitte” is the brand under which tens of thousands of dedicated professionals in independent firms around the world collaborate to provide audit, consulting, financial advisory, risk management, tax, and related services to clients. These firms are members of Deloitte Touche Tohmatsu, a UK private company limited by guarantee (“DTTL”). Deloitte uses a proprietary EA model and methodology (Deloitte IndustryPrint) to assist its clients. Deloitte’s EA services are part of its technology practice. Its EA practice works closely with its strategy, operations, risk, and human capital practices. These practice areas include EA as well as closely related services, such as technology strategy and transformation; change management; business model transformation; digital development; cloud; mobile; security; risk management; and human capital optimization.

■ **Infosys.** Infosys is a global consulting and IT company founded in 1981; it has more than 160,000 employees. It provides a range of EA services — EA definition and revitalization; IT portfolio analysis; IT strategy development; digital transformation; and software-led innovation. Infosys has 360 enterprise architects and saw strong growth of more than 20% in the last fiscal year. It has developed its own framework (Pragmatic EA). Its go-to-market strategy for its EA offering is to embed EA into more global consulting offerings, such as industrializing service delivery, modernizing IT assets, and digitizing ecosystems.
Strong Performers Deliver Traditional EA Services Well But Lag In One or More Areas

Strong Performers in our evaluation of EA service providers include:

- **EY.** EY is a global consulting and advisory organization with 190,000 employees. It delivers EA services primarily through performance improvement (PI), which is a subset of its advisory services focusing on business performance improvement; it helps clients navigate and respond to the forces affecting their business so that they can continue to innovate and grow, optimize their operations, and protect their brands and core business. EY takes its EA services to market in this context, driving EA projects predominantly from a business architecture perspective rather than an IT architecture perspective.

  EY uses bespoke methodologies like Value Pathway and supplements them with industry-standard tools and frameworks, such as APQC, for industry-standard processes in order to identify different levels of standardization and integration. EY also has sector-specific process models; for example, its Power and Utilities Maturity Model and Architecture (PUMMA) contains its process value chain, maturity model, risk and controls, key performance indicators, and IT systems environment for power and water companies. EY’s EA practice focuses on developing comprehensive solution architectures for horizontal and vertical industry scenarios, such as digital, supply chain, automated credit decisions, and connected vehicles.

- **Cognizant.** Cognizant is headquartered in Teaneck, New Jersey (US) and has approximately 200,000 employees and 50 delivery centers worldwide. Cognizant is a member of the Nasdaq 100, the S&P 500, the Forbes Global 2000, and the Fortune 500; it also ranks among the top-performing and fastest-growing companies in the world. Cognizant often delivers its bespoke EA methodology and services in association with other Cognizant consulting services, such as information architecture, process, digital transformation, innovation, and strategy. Its EA services use Cognizant’s bespoke “Transform while Perform” methodology and are embedded in all of Cognizant’s consulting services. Its EA services form the foundation for the corporate strategy of transforming the client relationship by leveraging its consulting capabilities.

- **Tech Mahindra.** Tech Mahindra has 95,000 employees delivering IT services and outsourcing and has a presence in 51 countries. It has about 40 enterprise architects in its core EA team. It offers a mentoring program (Penta-E) to its EA customers and consolidates its EA knowledge via a portal. Tech Mahindra mainly offers traditional EA services with its own set of frameworks, which it bases largely on customized TOGAF. It offers an interesting perspective for enterprise architects involved in DevOps optimization, which many of Forrester’s clients regularly ask about.

- **Capgemini.** Capgemini is a global consulting, technology, and outsourcing provider with more than 130,000 employees, including 3,000 architects in 40 countries. It had reported global revenues of €10.1 billion in 2013. Capgemini’s EA services are a key offering; however, its offering depends on customers’ needs. It has one of the leading proprietary EA frameworks —
IAF. In 2014, Capgemini created a digital transformation service and its EA services focused on digital transformation road maps; innovation management, big data and analytics; cloud services; mobility; Internet of Things; social and collaborative services; and security. Capgemini is investing in developing key competencies for software-as-a-service (SaaS), cloud services, and relevant EA training.

Contenders Lack Advanced Services But Are Still A Good Option For Some Firms

Contenders in our evaluation of EA service providers include:

- **HCL Technologies.** HCL Technologies has 100,000 employees operating in 26 countries across the Americas, Europe, Asia Pacific, the Middle East, and Africa. In 2014, HCL reported revenues of $5.36 billion. HCL has integrated EA services into its key propositions — digital systems integration; the development of modern application platforms; delivering enterprise function as a service, and implementing the enterprise of the future. HCL uses its bespoke methodologies, such as EDF, StraTeGem, and Datum, and supplements them with industry-standard tools and frameworks, such as IT CMF, to assess and drive clients' EA practices. HCL is extending its traditional EA services to address new architecture areas, such as customer journeys, eCommerce, big data, mobility, and cloud.

**SUPPLEMENTAL MATERIAL**

**Online Resource**

The online version of Figure 2 is an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

**Data Sources Used In This Forrester Wave**

Forrester used a combination of three data sources to assess the strengths and weaknesses of each solution:

- **Vendor surveys.** Forrester surveyed vendors on their capabilities as they relate to the evaluation criteria. Once we analyzed the completed vendor surveys, we conducted vendor calls where necessary to gather details of vendor qualifications.

- **Strategic briefings.** We asked vendors to conduct a presentation of a subset of their EA offering as well as their strategy for the EA offering. We used findings from these strategic briefings to validate details of each vendor’s product capabilities.

- **Customer reference surveys.** To validate product and vendor qualifications, Forrester also conducted reference surveys with three of each vendor’s current customers.
The Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we then narrow our final list. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in the Forrester Wave document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and we encourage readers to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve. For more information on the methodology that every Forrester Wave follows, go to http://www.forrester.com/marketing/policies/forrester-wave-methodology.html.

Integrity Policy

All of Forrester’s research, including Waves, is conducted according to our Integrity Policy. For more information, go to http://www.forrester.com/marketing/policies/integrity-policy.html.

ENDNOTES

1 Market sizes are Forrester estimates based on vendor feedback.
About Forrester

A global research and advisory firm, Forrester inspires leaders, informs better decisions, and helps the world’s top companies turn the complexity of change into business advantage. Our research-based insight and objective advice enable IT professionals to lead more successfully within IT and extend their impact beyond the traditional IT organization. Tailored to your individual role, our resources allow you to focus on important business issues — margin, speed, growth — first, technology second.

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« ERIC ADAMS, client persona representing Enterprise Architecture Professionals