IDC MarketScape

IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2018 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Business Analytics Consulting and Systems Integration Services Vendor Assessment

Source: IDC 2018

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

The content for this excerpt was taken directly from IDC MarketScape: IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2018 Vendor Assessment (Doc #US43786518). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

This IDC study represents a vendor assessment of the 2018 business analytics consulting and systems integration (C&SI) services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain the success of a vendor in the marketplace and help anticipate its ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide business analytics C&SI services market. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing business analytics C&SI services in both the short term and the long term. A significant component of this evaluation is the inclusion of the perception of business analytics C&SI services buyers of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC’s macroregions. Key findings include:

- For buyers of analytics services, employee adoption of analytics solution remains a major area of focus. According to IDC’s 2018 Business Analytics Consulting and Systems Integration Buyer Perception Survey, buyer spending on change management activities to drive adoption of analytics solutions has increased by 47% in 2017 compared with two years ago.
- Artificial intelligence (AI) is on top of mind of all buyers. Buyers are moving ahead with implementing industry and functional use case-based AI solutions, which includes utilizing AI to further drive process automation to improve workforce efficiency and productivity along with lowering operational costs.
- Internal skills shortage remains a key driver for enterprises to use C&SI services providers for their needs. Enterprises are utilizing C&SI services providers to fill skill gaps across all segments. From data science to technical skills around new and emerging technologies to industry-specific skills to functional capabilities such as fraud and risk, the demand for skills is forcing enterprises to rely more on their services partners.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of the 12 business analytics C&SI services providers with broad portfolios spanning IDC’s research coverage and with global scale. This assessment is designed to evaluate the characteristics of each firm — as opposed to its size or the breadth of its services. Given this approach, Lockheed Martin has been excluded, even though it is among the top 5 systems integrators based on worldwide revenue, because the firm typically receives over 80% of its revenue from the U.S. government. The inclusion criteria also dictate at least $400 million in revenue coming from a vendor’s business analytics C&SI services practice at a worldwide level as well as a minimum of 3,500 business analytics C&SI-associated global resources; furthermore, at least 10% of revenue and 10% of head count need to be located in each macroregion. In addition, it is conceivable and in fact the case that specialty firms can compete with multidisciplinary firms on an equal footing. As such, this evaluation should not be considered a “final judgment” on the firms to consider for a particular
project. An enterprise’s specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for an engagement.

**ADVICE FOR TECHNOLOGY BUYERS**

- **Business priorities.** Map business analytics solutions to your top business priorities and make partner vendor’s ability to help you achieve desired priorities a key element of your vendor selection criteria. Strengthening and enhancing customer service and improving operational efficiency were the top 2 in terms of business priorities success as rated by customers that were surveyed for this IDC MarketScape. Your priorities may differ, but the solution you adopt and partner you select should be able to help achieve the desired business priorities whatever they may be.

- **Business outcome and technical competency.** Select services partners for your business analytics C&SI services engagements that have strong technical competency and ability to help businesses achieve desired business outcome. Successful organizations carried out business analytics C&SI services projects by partnering with business analytics C&SI services providers that helped them achieve the desired business outcome they were looking for. It is essential that the investments you put in business analytics solutions drive the business outcomes they are planned to achieve, and therefore, it will be highly beneficial to partner with a provider that has a reputation to help you achieve these outcomes. Successful organizations also carried out business analytics C&SI services projects by partnering with business analytics C&SI services providers that helped attain the right technical competency and insights required for implementation of a successful analytics solution. Having a robust knowledge across best performing and best suited analytics applications and tools is essential for any successful business analytics initiative. Select a partner that can showcases the ability to bring the right set of technical knowledge and resources for your needs.

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

**VENDOR SUMMARY PROFILE**

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 the vendor’s strengths and challenges.

**Accenture**

According to IDC analysis and buyer perception, Accenture is a Leader in this IDC MarketScape for worldwide business analytics C&SI services.

Accenture applied intelligence, part of Accenture Digital, was launched as a separate practice in 2017. The practice helps clients use analytics and artificial intelligence to drive actionable insights at scale. Accenture Analytics applies sophisticated algorithms, data engineering, and visualization to extract business insights and help clients turn those insights into actions that drive tangible outcomes – to improve their performance and disrupt their markets.
With deep industry and technical experience, Accenture Analytics provides services and solutions that include, but are not limited to, analytics as a service through the Accenture Insights Platform, continuous intelligent security, machine learning, and IoT analytics.

**Strengths**

Buyers rate Accenture highly for its ability to integrate its project team with their internal team and provide sincere and trustworthy resources for a project. Similarly, IDC rates Accenture highly in terms of its end-to-end life cycle of business analytic services portfolio and its marketing strategy.

**Challenges**

IDC believes Accenture’s cost management strategy could be improved by proactively offering value-added use case development to the company’s customers. Also, Accenture’s customer service strategy could be improved by involving a third-party component to its customer feedback processes.

**Consider Accenture When**

Organizations should consider Accenture when they are looking for a partner that can provide tighter integration of resources with their internal teams. Accenture should also be on the short list when users are seeking trustworthy and high-quality resources for their project needs.

**APPENDIX**

**Reading an IDC MarketScape Graph**

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor’s current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor’s future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

**IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to
provide an accurate and consistent assessment of each vendor’s characteristics, behavior, and capability.

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

**Market Definition**

IDC believes the business analytics services value chain is made up of the following three pillars or areas: information management, analysis, and business inference. At the same time, a certain set of processes and technologies need to be delivered across these three areas. IDC believes the coupling of these processes and technologies with the previously mentioned areas defines the complete value chain of business analytics services (see Figure 2). For a detailed definition of the business analytics services illustrated in Figure 2, see *IDC’s Worldwide Services Taxonomy, 2018* (IDC #US42657218, March 2018).

This IDC MarketScape provides vendor assessment with regard to the advisory, assessment, plan, design, and build phases of the business analytics services value chain.

**FIGURE 2**

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**IDC’s Business Analytics Services Value Chain**

Source: IDC, 2018
Customer Perceptions of Business Analytics C&SI Services Vendors

A significant and unique component of this evaluation is the inclusion of the perceptions of business analytics C&SI services' buyers of both the key characteristics and the capabilities of the vendors evaluated. The buyers participating in IDC's Business Analytics Consulting and Systems Integration Services Buyer Perception Survey have partnered with at least one of the participating vendors directly on a business analytics C&SI project within their company. The survey findings highlight key areas where buyers expect business analytics C&SI services providers to showcase a range of capabilities. The buyers consider these capabilities a must-have for business analytics C&SI services to be able to fulfill the requirements of many business and IT issues that challenge the buyers.

LEARN MORE

Related Research

- Six Ways Services Providers Are Approaching Cognitive Computing (IDC #US42805517, June 2017)

Synopsis

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

"The business analytics services market will continue to see high customer demand and spending due to customer focus on digital transformation; interest in new and emerging areas such as artificial intelligence, IoT, AR/VR, blockchain, GPR, and intelligent automation; proliferation of new technologies and data sources; and pervasiveness of areas such as service and advanced analytics. C&SI services providers that can rapidly innovate solutions around new and emerging areas while keeping the focus on established segments of business analytics will enjoy high growth in the near future," says Ali Zaidi, research director, IT Consulting and Systems Integration Business Strategies at IDC.

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