IDC MarketScape


Gard Little

THIS IDC MARKETSCAPE EXCERPT FEATURES EY

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Business Consulting Services Vendor Assessment

Source: IDC, 2019

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

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Business Consulting Services 2019 Vendor Assessment (Doc # US44339119). 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 study represents the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor’s current and future success in the marketplace. This study assesses the capabilities and business strategies of many prominent business consulting firms. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing business consulting services during both the short term and the long term. A significant component of this evaluation is the inclusion of business consulting buyers’ perception of both the key characteristics and the capabilities of these consulting providers, both directly from the vendors’ clients and through a survey. As one would expect of market leaders, overall, these firms performed very well on this assessment. Key findings include:

- Worldwide, consulting providers are generally perceived as being able to integrate their engagement teams with those of their clients, understand the unique needs of a client’s business, and offer high-quality staff. They are also considered very capable of meeting the project timeline and maximizing the value of the project to all stakeholders.
- This evaluation discovered that generally enterprises are less impressed with the consulting providers’ ability to directly improve their commercial performance, help implement change that produces results, and integrate appropriate technologies – all essential to many significant business transformation initiatives.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of the five largest business consulting firms and additional firms with broad portfolios spanning IDC’s research coverage and with global or regional importance. This assessment is designed to evaluate the characteristics of each firm – as opposed to its size or the breadth of its services. 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

Use this IDC MarketScape as one tool in your qualification and selection of potential business consulting providers. While all firms have capabilities to help you drive organizational change, make the choice about which, if any, of these change management activities can be led by your consultant and which need to be driven by organizational insiders. Beyond that, consider the three areas cited in this worldwide evaluation where improvement is needed. These are:

- Integrate vendor’s project team with the client.
Understand the unique needs of each client's business.

Offer high-quality staff/service.

Determine which areas are important to you, and make sure you directly investigate each relevant area to understand the strategy and capability of each potential business consulting provider you are considering.

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.

EY

EY is an IDC MarketScape Leader worldwide in business consulting services in 2019, based on IDC analysis and customer feedback.

As of September 2018, EY has over 260,000 professionals across more than 150 countries globally. EY is one of the fastest-growing business consulting companies, with many countries presenting double-digit growth. EY's purpose is to help clients realize their potential based on the belief that when businesses work better, the world works better. EY positions itself as better-connected consultants that help clients navigate the transformative age – it does this by bringing together the talent, creativity, and experience of EY's entire organization and ecosystem of clients, alliance partners, and start-ups.

EY's core business consulting services sit within EY's Advisory organization and include risk, cybersecurity, data and analytics, digital, finance, supply chain, customer, program management, strategy consulting, and people advisory services – all enabled by EY's Technology practice, providing clients with the option of delivering some of these services through a managed services framework. Through these services, EY is able to support businesses in transformation, innovation, managing risk, analytics, cybersecurity, and digital. Rather than EY offering a siloed digital practice, digital skills are embedded throughout EY's organization. Its response to digital is holistic, cutting across sectors and infusing digital into its service lines and competencies.

EY also provides business consulting services beyond its advisory organization. These services sit across assurance, tax, and transactions and include post-transaction integration services, tax-effective process advisory, fraud investigation, legal services and disputes management, climate change and sustainability, and financial accounting advisory services.

EY's Global Innovation team and innovation centers are creating powerful ideas for organizations, especially around opportunities coming from emerging technologies such as artificial intelligence, blockchain, Internet of Things, and robotics. EY's 25+ innovation centers, called wavespace, located in some of the hottest innovation cities around the world, are a network of makers environments that combine business strategy, design thinking, and digital and technological expertise needed to rapidly prototype and bring client innovation ideas to life. They bring a unique opportunity to co-innovate and codevelop, leveraging EY's ecosystem and local start-ups.

EY's service lines are integrated in front of the client through the role of the Global Client Service Partner (GCSP), a dedicated relationship management role. The relationship role of the GCSP helps bring together services from across the whole firm. EY delivers through sectors and is investing in its
global industry centers of excellence (COEs), where it is developing cross-sector solutions, such as the future of transport, fighting financial crime, and Smart Cities, to bring to bear expertise from across the firm and complements these solutions through a number of assets to speed up delivery.

EY serves large international as well as medium-sized companies and regional and national organizations. EY has integrated delivery of firm services by forming single management units in its Americas, EMEIA, and Asia/Pacific regions to make serving clients globally more effective. EY has been investing in emerging geographies and has a large global talent hub based primarily in India, with additional regional resources in China, the Philippines, and Eastern Europe. EY leverages these resources in support of global projects on a talent as well as a cost basis.

In addition to its global footprint and its organic growth, EY has continued to acquire companies to strengthen its offerings. Over the past years, the following companies have been acquired by EY:

- Plaut IT Australia – Technology (January 2019)
- Fortune Cookie – Customer (January 2019)
- Skye – Digital (November 2018)
- Adelphi Digital Consulting Group – Customer (November 2018)
- Halo Management Consulting – Consulting services (November 2018)
- Krios Solutions – Consulting services (October 2018)
- OneBox Consulting Group – Strategy (September 2018)
- Xynapse Sdn Bhd – Cybersecurity (September 2018)
- Riverview Law – Legal services (August 2018)
- VODW – Customer (July 2018)
- Articulate Consulting – People advisory services (June 2018)
- Sonoma Partners – Technology (March 2018)
- Citizen Inc. – Strategy (January 2018)
- Aspect Security – Cybersecurity services (January 2018)
- etventure GmbH – Strategy (September 2017)
- Kivala – People advisory services (September 2017)
- OC&C France – Strategy (August 2017)
- Brightree Solutions – Technology (August 2017)
- Open Windows – Cybersecurity (July 2017)
- Italia Brand Group – Customer (June 2017)
- Condor – Financial services (April 2017)

EY has also formed alliances with partners such as Symantec, Oliver Wight, Adobe, Blackline, Cognizant, DDI, Dell EMC, GE Digital, Guidewire, Hortonworks, OpenText, IBM, Johns Hopkins, LinkedIn, Los Alamos National Laboratory, Microsoft, Mott MacDonald, Pegasystems, Procter & Gamble, SAP, SAS, ServiceNow, and YourEncore – enabling EY and its clients to tap into a wide ecosystem of skills, codeveloped solutions, and innovation. Finally, EY has developed strong collaborative relationships with well-respected research/academic institutions, including Tapestry Networks; Innovation Value Institute; Said Business School, the University of Oxford; and Harvard University.
**Strengths**

Among buyers worldwide, EY is perceived to do very well at helping clients increase productivity and improving clients' talent performance, retention, and engagement. On engagements, EY's performance is considered above average in terms of delivering on value-creating innovation and offering high-quality staff/service.

**Challenges**

EY should improve perceptions worldwide of its ability to help clients expand into new markets/geographies and to reduce costs. As far as engagement practices, EY should improve client perceptions of its ability to transfer knowledge/skills to the client and to provide industry insights.

**APPENDIX**

**Reading an IDC MarketScape Graph**

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

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

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

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

**IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, the vendors' customer references, 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. An additional component of this evaluation is the inclusion of the perception of business consulting buyers of both the key characteristics and the capabilities of these consulting providers. This insight is captured in a broad-based random global buyer value survey of consulting firm clients and reveals key insights regarding the capabilities of the individual firms. Prior to 2017, IDC used two years of data to evaluate firms. This year, with changes to the survey approach, we have only examined a single year's data when evaluating firms. However, we remain confident in the overall evaluation of each firm.
Market Definition

Business consulting involves advisory and implementation services related to management issues. It often includes defining an organization's strategy and goals and designing and implementing the structures and processes that help the organization reach its goals. Business consulting includes three main areas: strategy consulting, operational improvement consulting, and change and organization consulting. The market is primarily served by four firm types:

- **Big Four**: IDC recognizes the well-known Big Four firms as the four largest international accountancy and professional services firms – Deloitte, EY, KPMG, and PwC.

- **Multidisciplinary**: IDC describes multidisciplinary firms as large, diversified consulting organizations that offer a range of business consulting services to clients across a myriad of sectors. To distinguish these from other specialty firms, consulting services must address more than two business functional areas, in addition to providing strategy and operational implementations.

- **Technology led**: These are also large, multifaceted firms and are known for deep expertise in both technology and business consulting. IDC identifies these firms as those that expanded from information technology-centric businesses into more broad business consulting or vice versa.

- **Specialty**: Specialty firms have focused areas of consulting expertise in specific industries, functional areas, or technologies. Management and strategic consulting specialists that offer primarily strategy consulting and business intelligence (BI) models to specific sectors or industries including government fit into this category of firms.
Related Research


Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of a number of providers participating in the worldwide business consulting services market. The IDC MarketScape is an evaluation based on a comprehensive framework and a set of parameters that assesses providers relative to one another and to those factors expected to be most conducive to success in a given market during both the short term and the long term.

"Worldwide, consulting providers are generally perceived as being able to integrate their engagement teams with those of their clients, understand the unique needs of a client's business, and offer high-quality staff," noted Gard Little, vice president, Global Services Markets and Trends, "but, generally enterprises are less impressed with the consulting provider's ability to directly improve their commercial performance, help implement change that produces results, and integrate appropriate technologies."
About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

Global Headquarters

5 Speen Street
Framingham, MA 01701
USA
508.872.8200
Twitter: @IDC
idc-community.com
www.idc.com

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