IDC MarketScape

IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2020 Vendor Assessment

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THIS IDC MARKETSCAPE EXCERPT FEATURES EY

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2020 Vendor Assessment

Source: IDC, 2020

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

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IN THIS EXCERPT

The content for this excerpt was taken directly IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2020 Vendor Assessment (Doc # US45353220). 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 2020 business analytics consulting and systems integration (C&SI) services market through the IDC MarketScape model. This research provides a quantitative and qualitative assessment of the characteristics that explain the success of a vendor in the marketplace and help anticipate the vendor's ascendency. 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:

- Business drivers for buyers of analytics services were similar compared with two years ago, with improving innovation across the organization replacing improving operational efficiency among the top 5 business priorities. Vendors should align their services portfolios to address these business priorities, as buyers' top measure of success of a business analytics C&SI services engagement is achievement of their desired business outcomes.
- According to IDC's 2020 Business Analytics Services Buyer Perception Survey, nearly 65% of sponsors of business analytics C&SI services engagements were in roles outside the information technology (IT) function, such as line-of-business heads, CFO, or chief analytics/data officer. However, IT buyers remain highly influential stakeholders, with CIOs/CTOs and IT managers representing the two most common sponsors and increasing their collective share of sponsorship over the 2018 study.
- The vast majority of buyers reported that some or most of their business analytics services engagements included custom application development or managed services, indicating a clear need for vendors to support with execution of business analytics strategies.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of 11 business analytics C&SI services providers with global scale and with broad portfolios spanning IDC's research coverage. 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 $500 million in revenue coming from a vendor's business analytics C&SI services practice at a worldwide level as well as a minimum of 4,000 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**

- **Focus on your desired business outcomes.** Consider your overall strategy for adopting business analytics solutions, including the desired business outcomes as well as how (and by whom) solutions will be developed and managed across the organization. Seek out a services partner that understands your end goals and commits to working with you to achieve those business outcomes, including establishing appropriate KPIs for success, bringing use cases and innovation resources to the table, and helping you think through the impacts of incorporating analytics into your organization and processes. Select a partner that demonstrates the ability to deploy business analytics effectively and will put your business needs first in developing a solution.

- **Prepare for the future of intelligence.** Select a services partner that can help you create the strategic, technical, and organizational foundations for enterprise intelligence that will last long after your business analytics C&SI services project is complete. Successful organizations partnered with business analytics C&SI services providers that helped them clean, consolidate, and manage their business data in a timely manner, but access to data is just the beginning of what it will take to achieve enterprise intelligence over the long term. IDC defines future of intelligence as an organization's capacity to learn combined with its ability to synthesize the information it needs in order to learn and to apply the resulting insights at scale to gain a sustainable competitive advantage or an ability to fulfill the organizational mission (see *Future of Intelligence: Insights at Scale*, IDC #US45720519, January 2020). Choose a partner whose business analytics C&SI services offerings portray a forward-looking vision addressing each of these elements of the future of intelligence.

- **Use this IDC MarketScape for 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 base, 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.

**EY**

According to IDC analysis and buyer perception, EY is positioned in the Leaders category in this 2020 IDC MarketScape for worldwide business analytics C&SI services.

EY enables clients’ adoption of business analytics through two offering categories: Federated Data Fabric, which includes information strategy, data architecture and platforms, data virtualization, semantic data layer, and data and analytics as a service; and Trusted Intelligence, which embeds analytics insights and AI into sector- and function-led business transformation solutions. EY supports these services with a global network of innovation centers called wavespace, where the firm cocreates
business analytics solutions, including domain-specific ontologies and semantics, with clients, as well as a growing number of licensable data- and AI-driven technology assets hosted on the EY Client Technology Platform. EY also leverages alliances with technology platforms, such as SAP, IBM, Microsoft, and Stratio, to enable and deliver prebuilt business analytics solutions to clients.

**Strengths**

Buyers rate EY highly for its ability to provide customer service (particularly onsite), provide functional insights and competency, meet a project timeline and handle changes in project scope, and deliver reliable, accurate, and trustworthy business analytics solutions. IDC considers EY’s strategies around delivery consistency, marketing, innovation and R&D, skills, and increasing revenue per employee as key strengths.

**Challenges**

IDC believes EY’s sales and distribution strategy could be improved by adding a digital sales route that provides customers with the ability to purchase some business analytics C&SI services online. EY could also benefit from more go-to-market alliances with other complementary services suppliers and exploring go-to-market alliances involving more than one business analytics partner.

**Consider EY When**

Organizations should consider EY when they are looking for high-touch customer service and tight project management. EY should also be on the short list if you are seeking a partner that can provide functional expertise and a marketplace of prebuilt solutions to apply business analytics to your specific business problem.

**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.

**Market Definition**

IDC defines the business analytics services value chain as being made up of three pillars: 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, 2019* (IDC #US44916019, March 2019).

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**

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**Customer Perceptions of Business Analytics 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 Services Buyer Perception Survey* have partnered with at least one of the participating vendors directly on a business analytics C&SI services engagement within their company. The survey findings highlight key areas where buyers expect business analytics services providers to showcase a range of capabilities. The buyers consider these capabilities a must-have for business analytics services to be able to fulfill the requirements of many business and IT issues that challenge the buyers.

**Related Research**

- *Key Spend and Vendor Considerations: Analytics Services* (IDC #US45200020, March 2020)
- *Future of Intelligence: Insights at Scale* (IDC #US45720519, January 2020)

**Synopsis**

This IDC study represents a vendor assessment of the business analytics consulting and systems integration (C&SI) services market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the business analytics C&SI services market. This IDC MarketScape covers a variety of vendors participating in the business analytics C&SI 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 universe of business analytics continues to expand as technologies such as artificial intelligence, IoT, AR/VR, and intelligent automation create new opportunities for organizations to harness data insights for better decision making," says Jennifer Hamel, research manager, Analytics and Intelligent Automation Services at IDC. "Successful business analytics C&SI services providers will help buyers not only choose the right technology solution for their needs but also address challenges with data, people, and processes along the way to becoming intelligent organizations."
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.

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