

IDC MarketScape

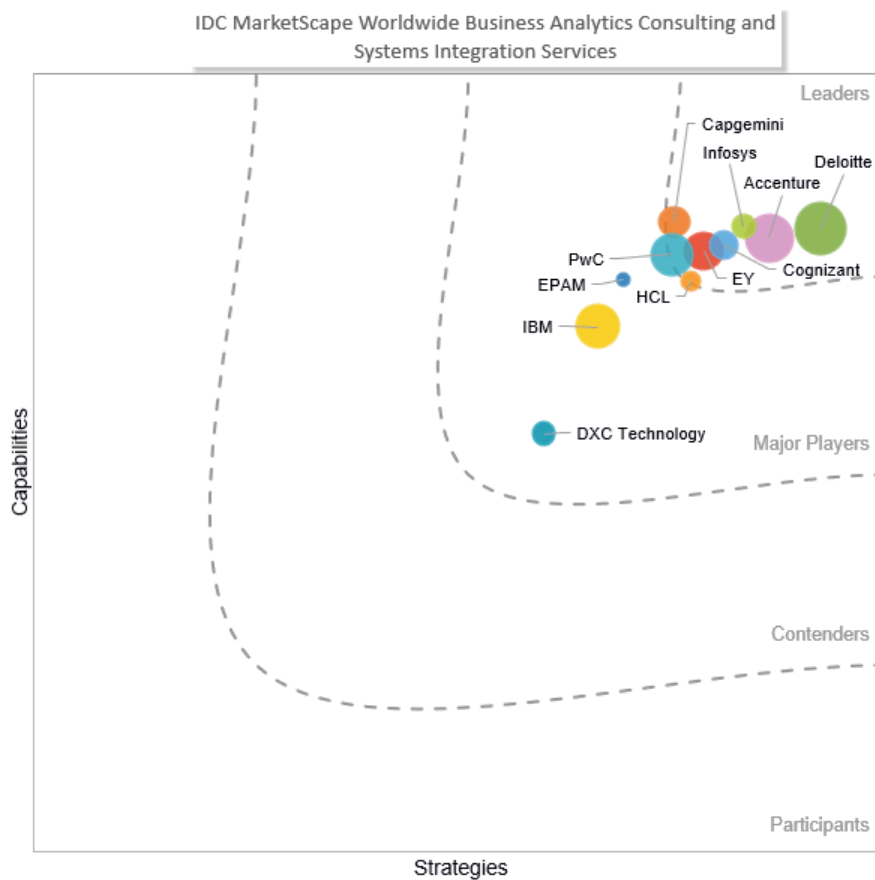
IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2020 Vendor Assessment

Jennifer Hamel

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.

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 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:

- 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 based, or otherwise.

VENDOR SUMMARY PROFILES

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 each vendor's strengths and challenges.

Accenture

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

Applied Intelligence is both Accenture's community of practice launched in 2017 and its unique human-centered approach to apply deep industry and technical expertise to help clients use AI, analytics, automation, and the data that fuels it to achieve intelligence at scale. Accenture's business analytics C&SI services offerings include data science and machine learning engineering, data engineering and architecture, analytics and AI strategy, and responsible AI. The practice also offers packaged solutions catering to domain-specific business analytics use cases across the value chain, including, but not limited to, Intelligent Revenue Growth, Applied Customer Engagement+, Intelligent Patient Services, Applied Supply Chain+, Applied Financial Crime Detection+, and Intelligent Operations. Enabling

Accenture's delivery of business analytics C&SI services are proprietary platforms such as AIP+, Intelligent Data Suite, Accenture myWizard, and Accenture SynOps Engine.

Strengths

Buyers rate Accenture highly for its ability to provide customer service (particularly onsite), meet a project timeline and handle changes in project scope, and provide industry and technical insights and competency. IDC considers Accenture's end-to-end life cycle of business analytics services portfolio and strategies around next-generation tools and methodologies, alliances, innovation and R&D, and employee skills and retention as key strengths.

Challenges

IDC believes Accenture'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. Such an addition could also help Accenture foster growth by targeting a nontraditional customer base. Also Accenture's customer service strategy could be improved by integrating a third-party component into the company's customer feedback processes.

Consider Accenture When

Organizations should consider Accenture when they are looking for a partner that can provide high-touch industry and technical expertise to apply analytics to their specific business problem. Accenture should also be on the short list if you are seeking a provider with depth in next-generation tools and methodologies and strong relationships with alliance partners to draw from to create a business analytics solution for your needs.

Capgemini

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

Capgemini launched Perform AI in 2018 as a group portfolio housing its data, business analytics, and AI capabilities, spanning multiple practices including Insights and Data, Business Services, Capgemini Invent, Digital Engineering and Manufacturing Services, and Cloud Infrastructure Services, as well as teams delivering services around enterprise applications such as SAP. Capgemini helps its clients infuse data, platforms, and insights into their business operations at scale through business analytics C&SI offerings including, but not limited to, Insights & Data Activate, AI & Data Engineering, AI & Analytics and Data Science, and Insights & Data-specific advisory services. The 890 by Capgemini marketplace also enables access to domain- and sector-specific analytics solutions, algorithms, and data sets from Capgemini and its clients and third-party providers via an as-a-service model.

Strengths

Buyers rate Capgemini highly for its ability to meet a project timeline and handle changes in project scope, integrate its project team with their internal team, provide appropriate and high-quality resources for a project, manage staff turnover during a project's lifetime, and offer flexible pricing models. IDC considers Capgemini's end-to-end life cycle of business analytics services portfolio and strategies for increasing delivery consistency, deepening relationships with ecosystem partners, and developing and monetizing business analytics IP as key strengths.

Challenges

IDC believes Capgemini's go-to-market strategy could be further improved by more go-to-market alliances with other complementary services suppliers and more joint ventures with existing alliance partners in the business analytics space. Also Capgemini's skills strategy could benefit from investing in a broader variety of skill sets, including UI/UX designers and change management experts within the company's business analytics C&SI services practice.

Consider Capgemini When

Organizations should consider Capgemini when they are looking for tight project management including handling changes in project scope and maintaining high-quality staff levels. Capgemini should also be on the short list if you are seeking a provider with end-to-end business analytics services capabilities and a marketplace for business analytics solutions.

Cognizant

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

Cognizant's AI and analytics practice, part of Cognizant Digital Business, focuses on helping clients harness their data into an asset, creating business analytics solutions that grow their businesses, reduce costs, manage risks, and engage consumers intelligently. Cognizant's end-to-end capabilities range from advisory services, data engineering, data modernization, business analytics, and AI services to managed services. Cognizant combines repeatable tools, platforms, methods, best practices, and accelerators into a core set of offerings for data and intelligence that includes Cognizant Data Modernization, Cognizant Customer Intelligence, and Cognizant Operations Intelligence. Cognizant continues to leverage its Sentient LEAF acquisition to support its advanced AI capabilities such as Cognizant Evolutionary AI, which uses evolutionary computation to optimize models, scale the work of data scientists, and find optimal solutions.

Strengths

Buyers rate Cognizant highly for its ability to showcase and codevelop relevant use cases for business analytics solutions, provide appropriate and high-quality resources for a project, and manage staff turnover during a project's. IDC considers Cognizant's strategies for increasing delivery consistency, marketing, innovation and R&D, and employee skills and retention as key strengths.

Challenges

IDC believes Cognizant's go-to-market strategy could be further improved by more go-to-market alliances with customers, joint ventures with existing alliance partners in the business analytics space, and exploring go-to-market alliances involving more than one business analytics partner. Also Cognizant could benefit from targeting a nontraditional customer base and exploring new avenues to monetize business analytics IP to foster growth.

Consider Cognizant When

Organizations should consider Cognizant when they are looking for consistent delivery and high-quality staff levels. Cognizant should also be on the short list if you are looking for a partner that can provide solution co-innovation resources to apply business analytics to your specific business problem.

Deloitte

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

Deloitte infuses its analytics and AI capabilities globally across its major industries and domains, with a strategy and AI insights-led approach combining strong industry and subject matter expertise with deep technology experience. Through Deloitte's "cognitization program," Deloitte creates digital full-time employees (FTEs), repeatable assets, frameworks, and methods to support business analytics deployments across the advise, implement, and operate life cycle. Deloitte brings analytics and AI platforms, such as ConvergeHEALTH and HUX, tuned to specific domain and industry issues and maintains a portfolio of AI-enabled assets, including but not limited to CapabilityEdge, Algorithmic Selling, ContextEdge, and DemandBrain, to help solve business issues. Deloitte works with partners from large technology vendors such as Google, AWS, Oracle, SAP, and Informatica to start-ups, bringing C&SI service offerings ranging from analytics and AI strategy; culture, change, and talent optimization; AI ethics, governance, and controls; AI insights and engagement; data and analytics modernization; robotics and intelligent automation; and cloud machine learning.

Strengths

Buyers rate Deloitte highly for its ability to clean, consolidate, and manage business data in a timely manner; showcase and codevelop relevant use cases for business analytics solutions; provide customer service (particularly onsite); and integrate its project team with their internal team. IDC considers Deloitte's end-to-end life cycle of business analytics services portfolio and strategies around next-generation tools and methodologies, delivery consistency, client adoption, marketing, innovation and R&D, and employee retention as key strengths.

Challenges

IDC believes Deloitte's customer service strategy, though strong, could be improved further by integrating a third-party component into the company's customer feedback processes. Also Deloitte'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.

Consider Deloitte When

Organizations should consider Deloitte when they are looking for a partner that can provide high-touch customer service and tighter integration of resources with their internal teams. Deloitte should also be on the short list if you are seeking a partner that can provide strong data management, next-generation tools and methodologies, and solution co-innovation to apply business analytics to your specific business problem.

DXC Technology

According to IDC analysis and buyer perception, DXC Technology (DXC) is positioned in the Major Players category in this 2020 IDC MarketScape for worldwide business analytics C&SI services.

DXC Analytics applies a combination of skills, industrialized delivery processes, and technology-driven innovation to help clients transform into data-driven businesses and to operationalize analytics and AI across their organizations. DXC supports clients across the data life cycle and at each level of the enterprise technology stack, with offerings ranging from advisory services, industry- and function-aligned business analytics services, and data engineering and platform services to information

governance. Underpinning and accelerating DXC Analytics' services are delivery frameworks and methodologies including, but not limited to, Analytics and AI Platform, Analytics Solution Starters, Analytics Modernization and Migration Factory, and Data Engineering and Utilities, as well as its analytics partner ecosystem.

Strengths

Buyers rate DXC highly for its ability to provide technical insights and competency; deliver reliable, accurate, and trustworthy business analytics solutions; integrate its project team with their internal team; and transfer knowledge to enable their internal team to manage a business analytics solution. IDC considers DXC's strategies around delivery consistency as key strengths.

Challenges

IDC believes DXC's marketing strategy could be improved by more thought leadership activities such as CXO surveys and increasing the level of event sponsorship at business analytics partners' key customer events. Also DXC could benefit from investing in a broader variety of skill sets, targeting a nontraditional customer base, and exploring new avenues to monetize business analytics IP to foster growth.

Consider DXC Technology When

Organizations should consider DXC when they are looking for technical expertise, consistent delivery, and reliable, accurate, and trustworthy business analytics solutions. DXC should also be on the short list if you are seeking tighter integration of resources with internal teams, as well as transfer of knowledge to enable your internal teams.

EPAM

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

EPAM combines its expertise in product engineering, technology, product development, and platform engineering to help solve large-scale, complex data and analytics challenges for clients, with a strong focus on execution. EPAM's business analytics C&SI services include data and analytics strategy, data science consulting, data technology consulting, self-service analytics programs implementation, data product engineering, and data and analytics platform engineering. A broad suite of accelerators and consulting programs enable EPAM to align its platform capabilities with clients' business outcomes, including solutions such as InfoNgen, TelescopeAI, EPAM DLab, EPAM Legion, DNN Synthetic Data Generator, and migVisor, as well as more than 200 vertical- and function-specific data product templates.

Strengths

Buyers rate EPAM highly for its ability to provide technical insights and competency; apply proven cloud methodologies and tools to business analytics solutions; deliver reliable, accurate, and trustworthy business analytics solutions; provide appropriate and high-quality resources for a project; manage staff turnover during a project's lifetime; and integrate its project team with their internal team. IDC considers EPAM's strategies around next-generation tools and methodologies, client adoption, and innovation and R&D as key strengths.

Challenges

IDC believes EPAM's marketing strategy could be improved by more thought leadership activities such as CXO surveys, increasing the level of event sponsorship at business analytics partners' key customer events, and increasing the visibility of the company's business analytics C&SI services on its website. EPAM could also benefit from more go-to-market alliances with other complementary services suppliers, deepening its relationships with existing alliance partners in the business analytics space, and exploring new avenues to monetize business analytics IP to foster growth.

Consider EPAM When

Organizations should consider EPAM when they are looking for a partner that can provide technical expertise, high-quality staff levels, and tighter integration of resources with internal teams. EPAM should also be on the short list if you are seeking a provider with depth in next-generation tools and methodologies and solution co-innovation to apply business analytics to your specific business problem.

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.

HCL

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

HCL's Data & Analytics practice, part of Digital & Analytics services, provides strategy, design, build, implementation, capability building, and ongoing support to enable clients to move to data-driven product and platform operating models. HCL recently refreshed its Data & Analytics portfolio to align with customer demands related to large-scale digital transformation, with offerings and accelerators across four pillars: Adaptive Data Platform, Intelligent Data Management, Consumption-based Analytics, and Applied AI. HCL has strong presence in banking, financial services, insurance, life sciences, healthcare, retail, and consumer goods industries. HCL leverages its FENIX2.0 execution methodology; capabilities acquired through DataWave, Actian, and SBE' and strong technology partnership ecosystem to deliver integrated data and analytics solutions at scale.

Strengths

Buyers rate HCL highly for its ability to offer flexible pricing models, optimize the ratio of onshore and offshore efforts on a project, meet a project timeline and handle changes in project scope, and transfer knowledge to enable their internal team to manage a business analytics solution. IDC considers HCL's strategies around innovation and R&D and employee retention as key strengths.

Challenges

IDC believes HCL's go-to-market strategy could be improved by more go-to-market alliances with data vendors and other complementary services suppliers, as well as exploring go-to-market alliances involving more than one business analytics partner. HCL could also benefit from leading more keynote speaking opportunities at business analytics partners' key customer events and exploring new avenues to monetize business analytics IP to foster growth.

Consider HCL When

Organizations should consider HCL when they are looking for a partner with flexible pricing and delivery resource models. HCL should also be on the short list if you are seeking tight project management and transfer of knowledge to enable your internal teams.

IBM

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

IBM Services brings together data, analytics, AI, automation, IoT, blockchain, 5G, and edge computing technologies to help clients to design "intelligent workflows" in seven key areas: source to self, customer engagement, talent, risk and compliance, financial management, asset management, and Industry 4.0. The analytics practice uses prebuilt assets, aligned by industry and/or functional domain, as well as methodologies such as its IBM Garage Method, Digital Insights Method, Conversational Design Method, and Rapid Asset Development - Machine Learning Method, to accelerate solution co-innovation with clients. Although the analytics practice is tightly affiliated with IBM-owned IPs such as Cognos, Watson, and The Weather Company, IBM Services is solution agnostic and also integrates analytics capabilities from partners, such as Apple, Salesforce, Workday, and SAP, where appropriate to meet client needs.

Strengths

Buyers rate IBM highly for its ability to provide technical insights and competency, showcase its thought leadership, source appropriate and valuable data from outside their organization, and apply proven methodologies and tools. IDC considers IBM's end-to-end life cycle of business analytics services portfolio, the breadth of pricing models the company offers to customers, and the breadth of its business analytics C&SI offerings as key strengths.

Challenges

IDC believes IBM's marketing strategy could be improved by leading more keynote speaking opportunities and increasing the level of event sponsorship at business analytics partners' key customer events. Also while IDC recognizes IBM's efforts to leverage a broad partner ecosystem, IBM could benefit further from deepening its relationships with existing alliance partners in the business analytics space, including greater emphasis on gaining partner recognition of its business analytics services practice.

Consider IBM When

Organizations should consider IBM when they are looking for technical expertise and end-to-end business analytics services capabilities. IBM should also be on the short list if you are looking for a partner that can assist with integrating external data sources into your business analytics solution.

Infosys

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

Infosys' data and analytics services offerings include business, data, and AI consulting; analytics and AI; insights delivery; data engineering; architecture; data operations; data-led services and solutions by function and industry; and integrated data services. Infosys supports clients' journeys across three horizons, from making better decisions as a data-driven enterprise to reimagining business as a data-native, digital-native enterprise, and finally leveraging data as the new capital to take part in the data economy. Homegrown and partner-driven platforms such as Infosys NIA, Infosys Digital Brain, Infosys Enterprise Data & Analytics Platform, Infosys Enterprise Cognitive Platform, Infosys Information Grid, and Infosys Analytics Workbench, among others, enable the company to accelerate development of client solutions. Infosys enables clients' business analytics innovation efforts at scale through its Living Labs, with an emphasis on reducing business risk through user-focused design thinking, rapid prototyping, and cost-effective delivery.

Strengths

Buyers rate Infosys highly for its ability to achieve desired business outcomes, provide technical insights and competency, provide customer service (particularly onsite), and work with partners. IDC considers Infosys's end-to-end life cycle of business analytics services portfolio and strategies around innovation and R&D, employee skills and retention, and increasing revenue per employee as key strengths.

Challenges

IDC believes Infosys' go-to-market strategy, while strong, could be further improved by more go-to-market alliances with customers, joint ventures with existing alliance partners in the business analytics space, and exploring go-to-market alliances involving more than one business analytics partner.

Infosys could also benefit from increasing its level of event sponsorship at business analytics partners' key customer events.

Consider Infosys When

Organizations should consider Infosys when they are looking for high-touch customer service and technical expertise. Infosys should also be on the short list if you are seeking a provider with end-to-end business analytics services capabilities and a broad range of skills to apply business analytics to your specific business problem.

PwC

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

PwC's data and analytics practice provides a range of business analytics services through the firm's analytics transformation framework covering six capability dimensions: business decisions and analytics, data and information, technology and infrastructure, organization and governance, process and integration, and culture and talent. PwC's Integrated Solution offerings combine business strategy, industry expertise, and embedded data, analytics, and AI capabilities to rapidly address critical client issues. PwC applies its business, experience, and technology (BXT) approach to create and deliver business analytics solutions for clients, leveraging homegrown IPs such as Cross Data Platform and Insights Platform, as well as technologies from partners, such as Microsoft, Google, and Amazon Web Services, open source platforms, start-ups, and academia.

Strengths

Buyers rate PwC highly for its ability to deliver reliable, accurate, and trustworthy business analytics solutions; apply proven methodologies and tools; and manage staff turnover during a project's lifetime. IDC considers PwC' strategies around marketing, skills, and increasing revenue per employee as key strengths.

Challenges

IDC believes PwC's customer service strategy could be improved by integrating a third-party component into the company's customer feedback processes. PwC could also benefit from more go-to-market alliances with customers, joint ventures with existing alliance partners in the business analytics space, and increasing the visibility of its business analytics C&SI services on its website.

Consider PwC When

Organizations should consider PwC when they are looking for flexible and high-quality staff levels. PwC should also be on the short list if you are seeking a partner that can provide innovative delivery tools and methodologies and reliable, accurate, and trustworthy business analytics solutions.

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.

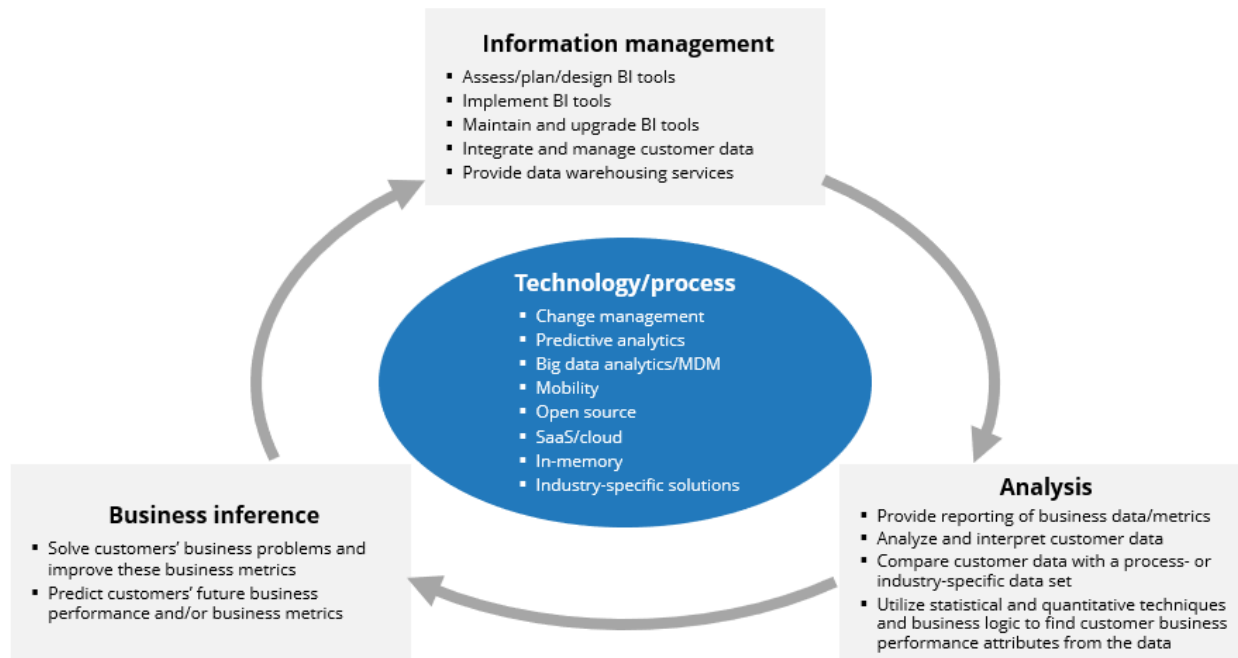
Market Definition

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

IDC's Business Analytics Services Value Chain



Source: IDC, 2020

Customer Perceptions of Business Analytics Services Vendors

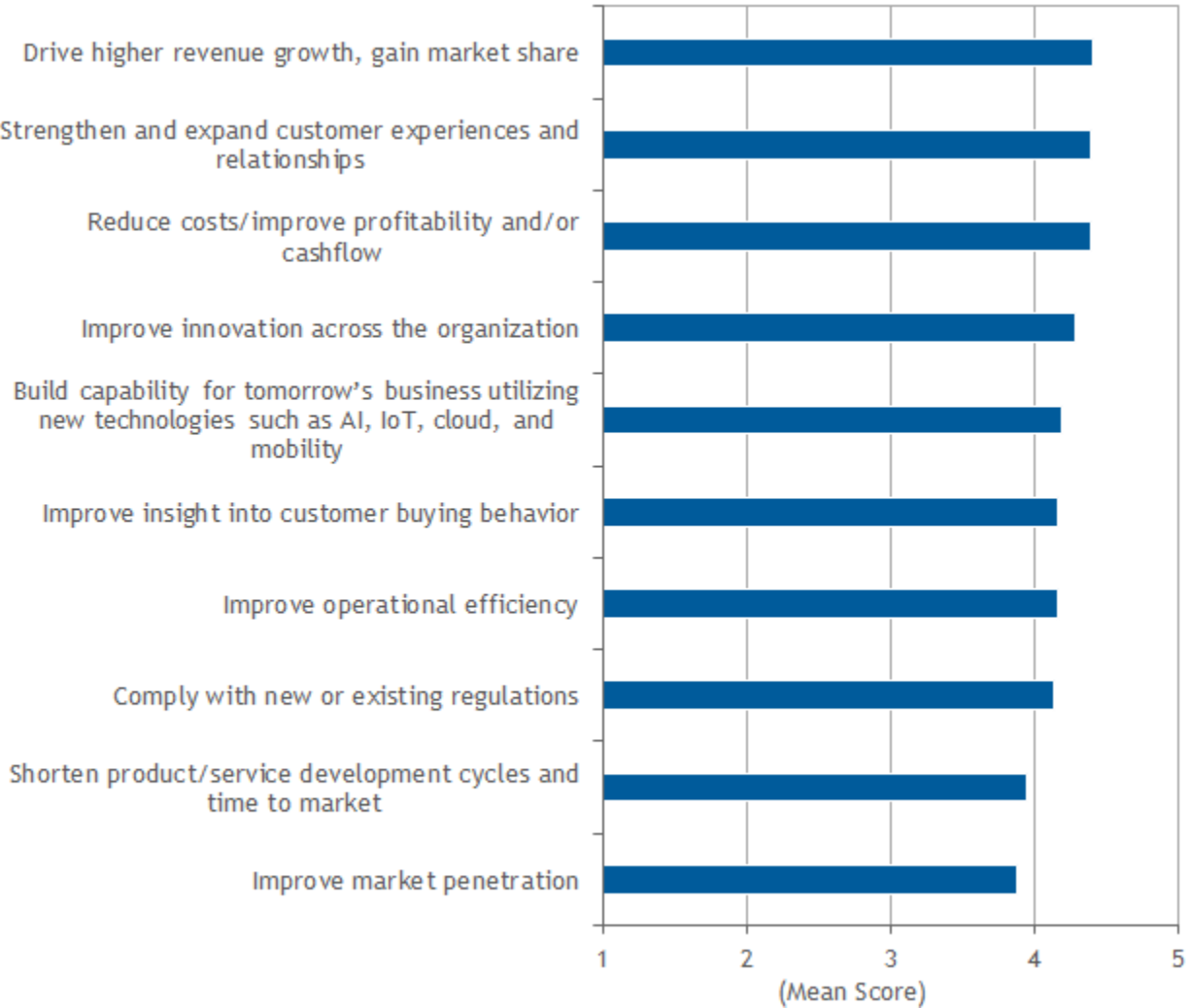
A significant and unique component of this evaluation is the inclusion of the perceptions of business analytics C&SI services' buyers of both the key characteristics and the capabilities of the vendors evaluated. The buyers participating in IDC's *Business Analytics Services Buyer Perception Survey* 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.

Figure 3 illustrates the top 10 business drivers for business analytics services projects for the business analytics C&SI services customers surveyed in 2020. Customers cited driving revenue growth and strengthening customer relationships as the top 2 business drivers for taking on business analytics services.

FIGURE 3

Top 10 Business Drivers for Business Analytics Services Engagements, 2020

Q. How important a business priority do you believe each of the following is currently for your company?



n = 58

Note: Mean scores are based on a scale of 1-5, where 1 is not a priority and 5 is a critical business priority.

Source: IDC's *Business Analytics Services Buyer Perception Survey*, 2020

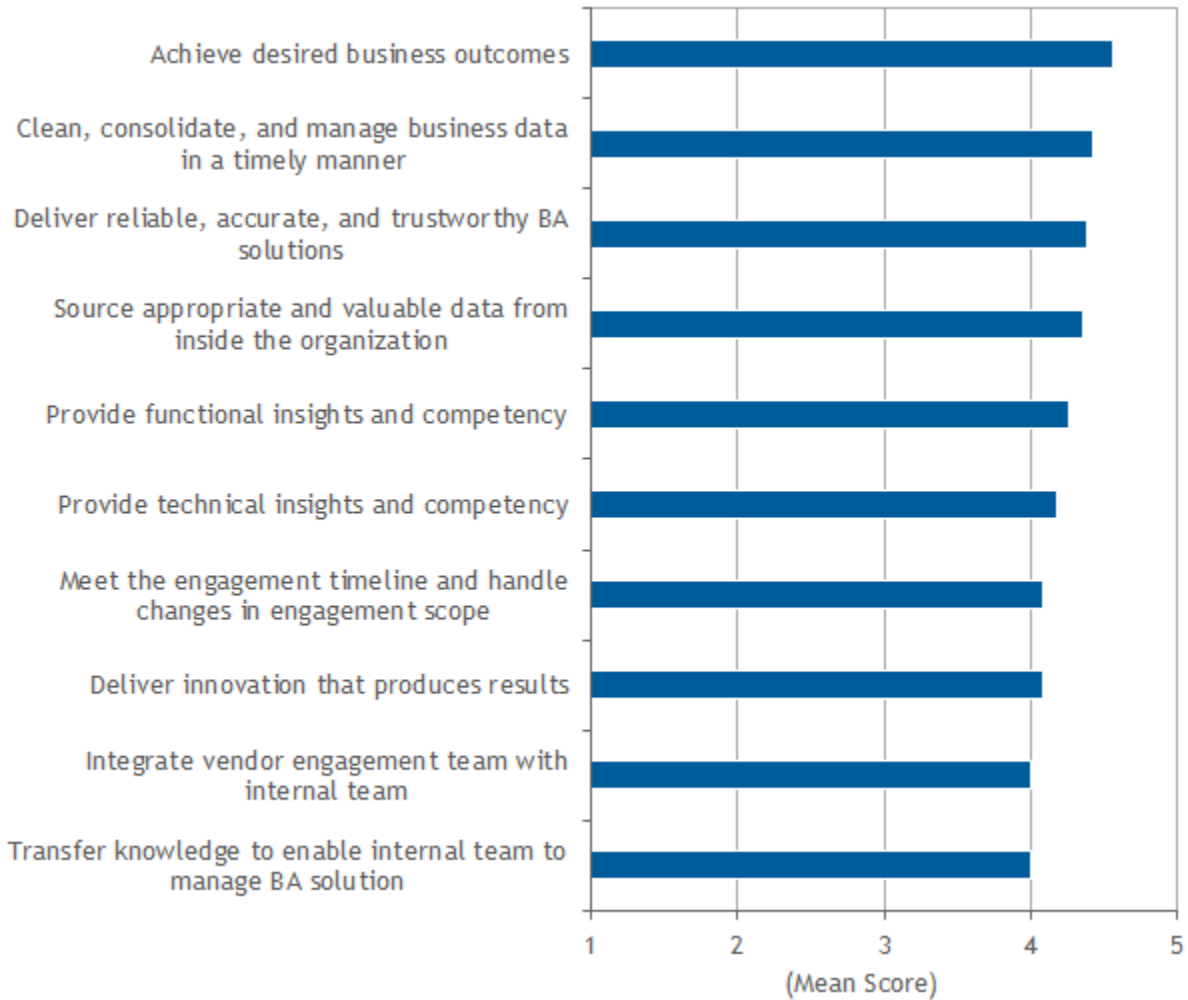
Figure 4 illustrates the rank order of factors important for a successful business analytics services engagement for the business analytics C&SI services customers surveyed in 2020. The survey findings suggest that the ability to achieve desired business outcomes by the consulting and delivery teams working on a business analytics services engagement is the most critical factor for the successful completion of the engagement. Customers also indicated a vendor's ability to clean, consolidate, and manage business data; deliver reliable, accurate, and trustworthy business analytics

solutions; source appropriate and valuable internal data; and provide functional insights and competency to be among the most critical attributes for an engagement's success.

FIGURE 4

Top 10 Factors for Successful Business Analytics Services Engagements, 2020

Q. For a business analytics services engagement to be successful, please indicate the importance of each of the following characteristics.



n = 58

Note: Mean scores are based on a scale of 1-5, where 1 is not essential to success and 5 is essential to success.

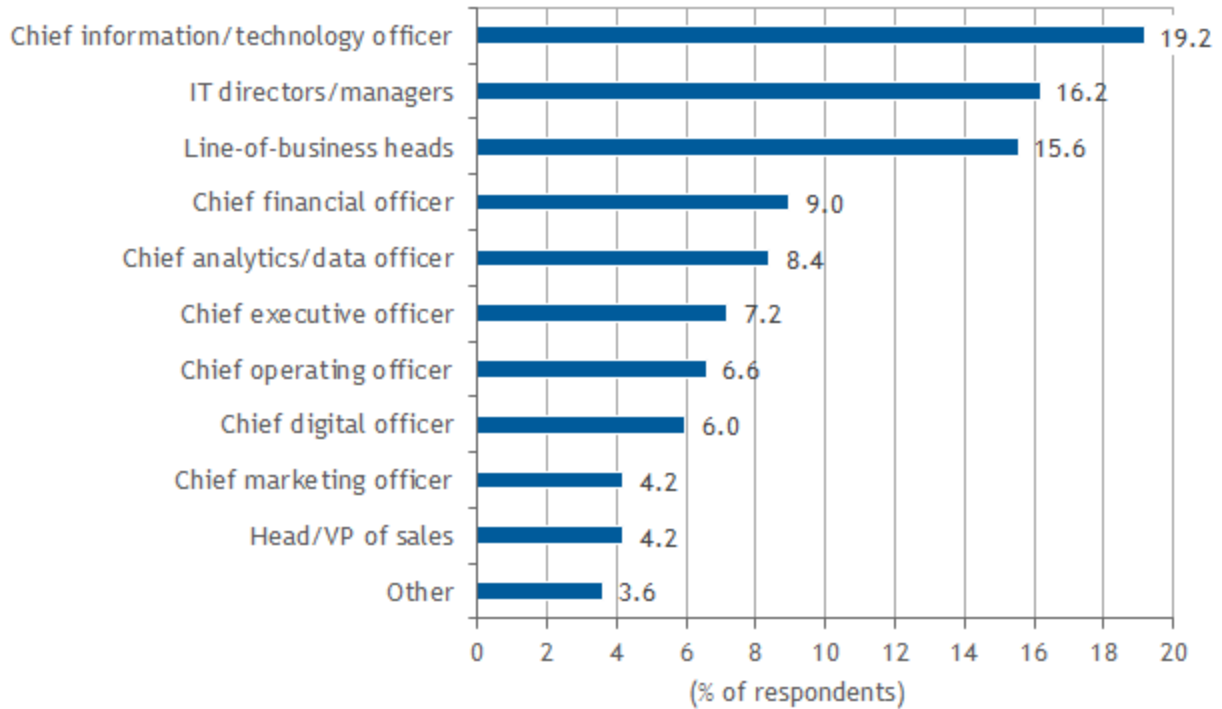
Source: IDC's *Business Analytics Services Buyer Perception Survey, 2020*

Figure 5 illustrates the relative proportion of key sponsors for business analytics services engagements for the business analytics C&SI services customers surveyed in 2020. CIOs/CTOs (19.2%) account for the largest share, followed by IT directors/managers (16.2%), line-of-business heads (15.6%), and CFOs (9%). Chief analytics/data officers (8.4%), CEOs (7.2%), and COOs (6.6%)

represent the next three top sponsors for business analytics services engagements. IT's role in leading the business analytics initiatives in organizations continues to rise. Between CIOs/CTOs and IT managers, the IT buyers represent 35.3% of the total sponsorship, up from 34.6% in 2018.

FIGURE 5

Key Sponsors for Business Analytics Services Engagements, 2020



n = 58

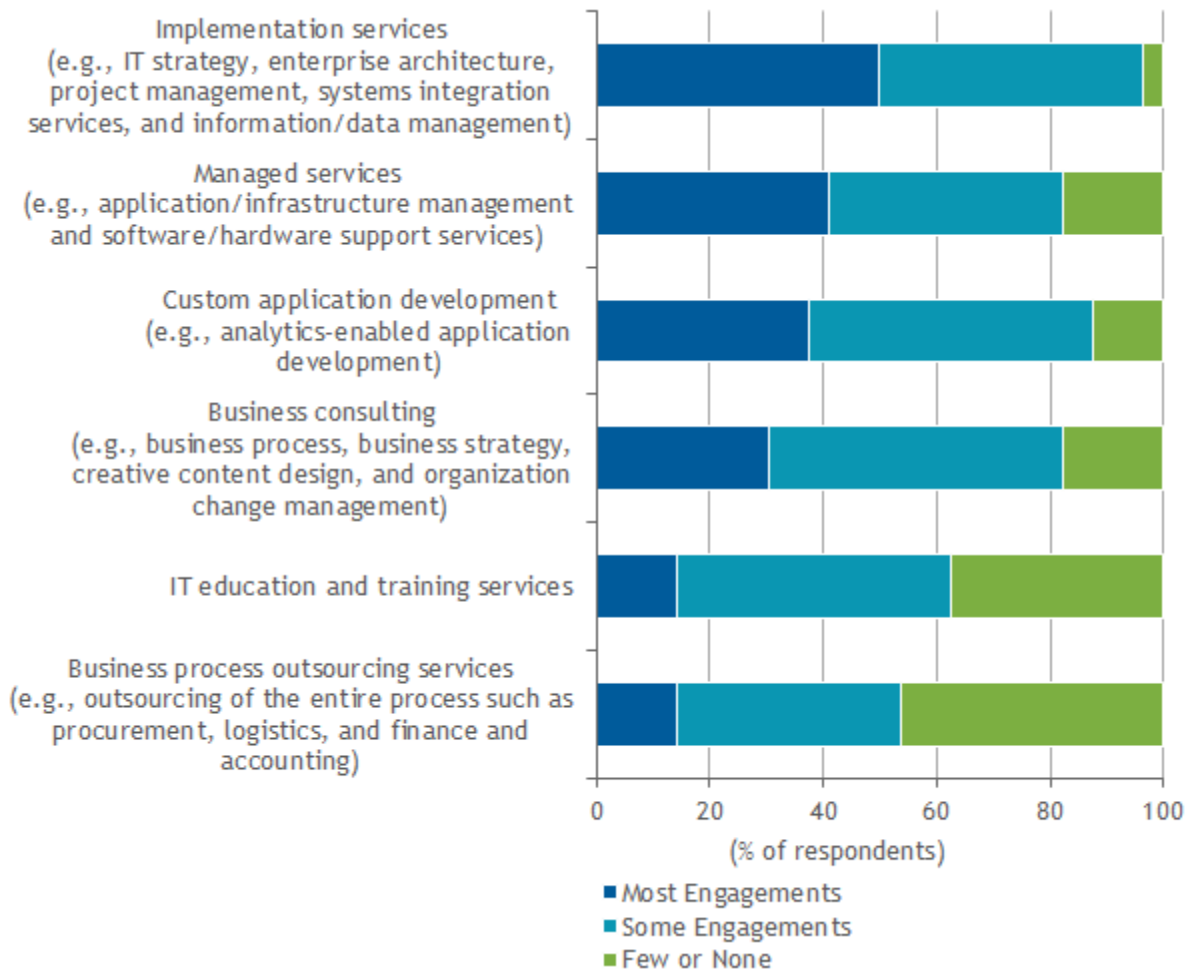
Note: The "other" category includes global commercial capabilities, managing director, IT VP, head of research and development, and data and automation tribe lead.

Source: IDC's *Business Analytics Services Buyer Perception Survey*, 2020

Figure 6 illustrates the service lines bundled with business analytics services engagements for the business analytics C&SI services customers surveyed in 2020. The top service lines included in most business analytics services engagements were implementation services (50%), managed services (41.1%), and custom application development (37.5%), indicating buyers typically expect vendors to deliver across the business analytics services life cycle. Business consulting was included in most business analytics services engagements for only 30.4% of customers but were included in some business analytics services engagements for more than half (51.8%) of customers.

FIGURE 6

Services Bundled with Business Analytics Services Engagements, 2020



n = 58

Source: IDC's *Business Analytics Services Buyer Perception Survey*, 2020

Strategies and Capabilities Criteria

This section includes an introduction of market-specific weighting definitions and weighting values.

IDC believes business analytics C&SI services vendors must exhibit the characteristics shown in Tables 1 and 2, respectively, to be completely successful when crafting a future strategy and in leveraging existing capabilities to their best advantage. The factors were weighted because IDC believes that some factors are more important than others in maximizing market opportunity and realizing market success.

TABLE 1**Key Strategy Measures for Success: Worldwide Business Analytics Consulting and Systems Integration Services**

Strategies Criteria	Criteria for Success	Weights (%)
Functionality or offering strategy	Excellence is marked by plans to align business analytics C&SI services offerings with key customer business priorities.	6.50
Delivery model	Excellence is marked by plans to support business analytics C&SI services utilizing more efficient tools and methodologies.	8.50
	Superior vendors have a well-articulated plan for increasing delivery consistency in the future	7.50
Client adoption strategy	Superior service calls for ways by which the vendor can help clients justify expenditures including ROI models, and it provides clear paths by which the client can co-innovate and adopt business analytics solutions.	9.00
Portfolio strategy	A strong portfolio strategy dictates that well-thought-out plans are in place to ensure development of offerings across the entire life cycle of business analytics services.	7.00
Sales/distribution strategy	Excellence is demonstrated by plans to improve sales efforts.	8.00
Marketing strategy	Successful vendors have a well-articulated plan for how they will market their business analytics C&SI capabilities in the future.	6.50
	It measures how prominent the vendor's business analytics services features are on its website.	1.50
Customer service strategy	Superior vendors have a well-articulated plan for lowering client churn in the future.	7.50
Other go-to-market strategy	Excellence is demonstrated by plans to improve sales channels using a broad partner ecosystem.	1.50
	Excellence is demonstrated by plans to improve the depth of relationships within the vendor's partner ecosystem.	2.50
Growth strategy	A vendor has strategic plans for both organic and inorganic growth and ones that align well with the overall IT trends in the next one to three years.	9.00
	Superior planning for developing and monetizing business analytics IP and platforms.	2.00
Innovation strategy	Strategic plans for attaining or retaining functional superiority over competition by improving innovation in business analytics C&SI services delivery methodologies and tools.	7.50

TABLE 1

Key Strategy Measures for Success: Worldwide Business Analytics Consulting and Systems Integration Services

Strategies Criteria	Criteria for Success	Weights (%)
Financial/funding model	A vendor's funding strategy is viable for the next one to three years, with solid plans for growing revenue per employee.	5.50
Employee strategy	Excellence is marked by the breadth of skills vendor has in its business analytics practice.	4.00
	A vendor has solid plans for hiring and retaining top-performing employees.	6.00
Total		100.00

Source: IDC, 2020

TABLE 2

Key Capabilities Measures for Success: Worldwide Business Analytics Consulting and Systems Integration Services

Capabilities Criteria	Criteria for Success	Weights (%)
Functionality/offering delivered	There is an analyst evaluation of the vendor's current business analytics C&SI services offerings.	10.00
	Offering capability is a combination of functional (domain) knowledge, industry insights, and technical capabilities along the entire stack of business analytics services. It also includes the breadth and depth of vertical-specific solutions as well as the ability to achieve desired business outcomes for the clients.	8.00
Delivery model appropriateness and execution	There is an analyst evaluation of the vendor's level of automated delivery of business analytics C&SI services.	6.00
	The delivery model must include an appropriate integration with the client team, the ability to meet client-developed project timelines, the ability to apply proven methodologies/tools, the ability to integrate business analytics solutions with the client's existing IT environment, the ability to handle changes in project scope, and the ability to deliver AI-enabled automation services.	8.00
Cost competitiveness	Cost competitiveness can best be measured by the ability to deliver an appropriate and sustainable return on investment for the client.	4.00
Portfolio benefits delivered	It includes strength of the vendor's capabilities to deliver the full business analytics services life cycle to complement C&SI services.	3.00
Pricing model options and alignment	There is an analyst evaluation of the types of pricing models offered to clients.	4.00
	The extent of flexible arrangements such as the client choosing to be billed as the budget allows is measured.	3.00
Sales/distribution structure and capabilities	There is an analyst evaluation of the size of the vendor's sales professionals dedicated to selling business analytics C&SI services.	5.00
	Vendors must operate by balancing both local and global requirements and work with channel partners. Vendors should be able to work with partners (hardware/software product partners, other business/IT services providers) and should also be able to optimize ratio of onshore/offshore efforts on a project.	4.00

TABLE 2

Key Capabilities Measures for Success: Worldwide Business Analytics Consulting and Systems Integration Services

Capabilities Criteria	Criteria for Success	Weights (%)
Marketing	There is an analyst evaluation of the various marketing channels used related to business analytics services.	3.50
	A vendor should be able to communicate the value of its services/solution and delivery methodologies/tools that are currently being consumed by the clients as well as those that are not being currently consumed.	2.50
Customer service delivery	There is an analyst evaluation of the vendor's ability to retain customers.	5.00
	A vendor's ability to provide service to a client is contingent on its ability to deploy local resources where appropriate to resolve problems/issues.	4.00
Growth strategy execution	There is an analyst evaluation of revenue growth rates for business analytics C&SI services.	6.00
	Essential to a services vendor's growth is the ability of the firm to develop "referenceable clients." Clients that strongly believe the vendor will represent their best interests are most often referred.	5.00
Innovation/R&D productivity and pace	The ability of a vendor to be innovative can be showcased in the way it transfers this innovation to its clients via innovative service delivery, the quality and depth of thought leadership it generates, and the ability to bring ROI models to the table to support business case for business analytics adoption.	8.00
Employee management	Success is measured, in part, by the head count associated with the practice.	6.00
	Success is also measured by how well a business analytics services vendor manages its staff turnover during a project's lifetime and the quality of resources for the projects based on client perception.	5.00
Total		100.00

Source: IDC, 2020

LEARN MORE

Related Research

- *IDC MarketScape: Worldwide Cloud Business Analytics Services 2020 Vendor Assessment* (IDC #US45353120, forthcoming)
- *Key Spend and Vendor Considerations: Analytics Services* (IDC #US45200020, March 2020)
- *Future of Intelligence: Insights at Scale* (IDC #US45720519, January 2020)
- *IDC FutureScape: Worldwide Data, Integration, and Analytics 2020 Predictions* (IDC #US44802519, October 2019)
- *Market Analysis Perspective: Worldwide Analytics and Intelligent Automation Services, 2019* (IDC #US44537419, September 2019)
- *Worldwide Business Analytics Services Forecast, 2019-2023* (IDC #US44119119, June 2019)
- *IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2018 Vendor Assessment* (IDC #US43786518, May 2018)

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."

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Global Headquarters

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

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