

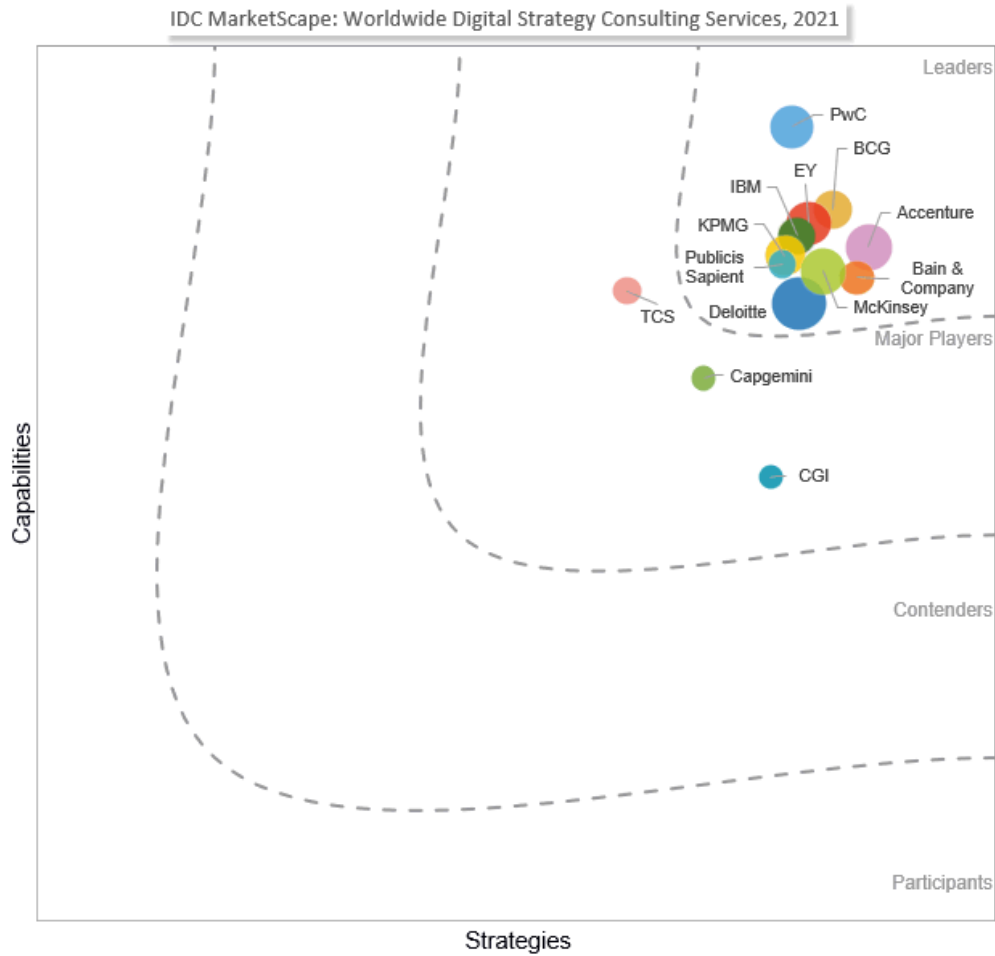
# IDC MarketScape: Worldwide Digital Strategy Consulting Services 2021 Vendor Assessment

Douglas Hayward

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Digital Strategy Consulting Services Vendor Assessment



Source: IDC, 2021

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

## IDC OPINION

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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 digital strategy consulting services marketplace. This study assesses the capabilities and business strategies of 13 prominent digital strategy consulting services vendors. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing digital strategy consultancy. A significant component of this evaluation is the inclusion of digital strategy consulting buyers' perception of both the key characteristics and the capabilities of these providers. This client input was provided primarily from the vendors' clients, supplemented with a worldwide survey.

Key findings include:

- **Consultancies are getting the basics right.** Reference clients that IDC spoke with were impressed by the quality of the people from the leading digital strategy consultancies. On average, reference clients gave consultancies highest scores for people quality, action orientation, and client-specific insight. This indicates that digital strategy consultancies are getting the basics right – they are recruiting smart and empathetic people and are training and developing them well, they are getting to know their clients inside out, and they are producing very useful advice as a result.
- **Clients want to be challenged more than ever by their digital strategy consultants.** At a time of immense cultural, demographic, and political change, businesses and public bodies are keenly aware that they must rethink what they do and how they do it, in the face of changing expectations from consumers and citizens. Most of the organizations that IDC has talked to during the research for this assessment said they want to be challenged more by their digital strategy consulting partners. Even when they say that their consultancy challenges them, they usually add that it doesn't challenge them enough.
- **Differentiation is arguably the Achilles' heel of the leading consultancies.** On average, clients gave their lowest score when asked how differentiated they considered their consultancy to be from its peers. With consulting still a very people-based business, and with consultancies often recruiting from each other and/or from shared talent pools such as elite universities, it is not surprising that even clients that were impressed by their digital strategy consulting partner often felt that they could probably get something similar from one of its competitors. This might indicate that consultancies need to invest more in branding and nonhuman differentiators (such as intellectual property [IP]). But arguably, it also indicates that consultancies would benefit from having more diverse workforces.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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This research includes analysis of offerings from services providers with digital strategy consulting offerings worldwide, including those with broad portfolios and specialty services spanning IDC's research coverage.

This assessment is designed to evaluate the characteristics and buyer perceptions of each vendor, as opposed to its size or the breadth of its services:

- The first entry criterion for inclusion in this assessment was that a vendor appeared in at least one of the five supplier categories laid out in *IDC Market Glance: Digital Strategy Consulting, 3Q20* (IDC #US46364020, August 2020). Specifically, these five categories are business consultancies, IT consultancies, specialist consultancies, digital agencies, and regional players.
- The scope of this assessment is global and end-to-end services. Two of the vendor categories in the previously mentioned IDC Market Glance document, specialist consultancies and regional players, were therefore not used because the scope of this assessment goes beyond the range of services typically provided by vendors based only in these categories.
- Within the remaining three categories listed previously, the vendors selected for inclusion in this assessment were those that IDC considered to supply a broad and deep range of digital strategy consulting services globally. This included the capability to drive business model and operating model change for clients, robust industry-specific digital strategy capabilities, a broad range of tier 1 technology alliances, a body of published digital strategy thought leadership, and a global network of physical (and, following the COVID-19 pandemic, virtual) leading-edge client-facing innovation facilities.
- Those vendors finally selected had what in IDC's view were the most robust end-to-end global capabilities, accompanied by substantial business consulting and IT consulting capabilities, and were characterized by a balanced geographic distribution of revenue such that no single macroregion (Americas, Europe, the Middle East, and Africa [EMEA], and Asia/Pacific) accounted for two-thirds or more of the vendor's combined worldwide IT and business consulting revenue.

Other vendors on the market with less comprehensive services portfolios and/or with narrower geographic reach may be capable of providing the breadth and the quality of digital strategy consulting services required by clients, depending on the scope of the engagement. In addition, an organization's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for any engagement. As such, this evaluation should therefore not be considered a "final judgment" on the vendors to consider for an engagement.

## ADVICE FOR TECHNOLOGY BUYERS

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### Priorities Will Shift When the Pandemic Is Under Control – But We Don't Currently (Mid-2021) Know Exactly *When* That Will Happen

- **Today, resilience and profitability are the key enterprise strategic priorities.** For most organizations, the key priority during the COVID-19 pandemic has been to ensure survival of the enterprise by protecting their people, cash flows, and supply chains. Once that goal is secured, the focus usually switches to reworking the operating model – driving greater agility and speed to deal with rapidly changing environments and making the organization's capabilities and culture more "digital native." That means allowing where necessary for partly or fully remote working and for new forms of customer and supplier engagement:
  - According to IDC's *Global Buyer Perception of Business and IT Consulting Providers Survey*, carried out in December 2020 (353 organizations were polled worldwide), the top 3 strategic business objectives of organizations while the pandemic still rages are to "make our business more efficient and profitable," "make our business more resilient," and "attract, retain, engage, and monetize customers better." The fourth and fifth objectives, respectively, are to "make faster and smarter business decisions" and "better manage regulatory and compliance issues." This suggests that the top strategic priorities are essentially "defensive" or "resilience" drivers around efficiency, flexibility, and financial health.

- The focus for the resilient organization is to drive agility and ensure that it can operate normally and generate the cash flow (or at least secure the credit lines) it needs to invest for revenue growth when customer demand growth returns – given that this new demand growth may occur in a very different business and social environment after the pandemic is under control.
- Resilience may appear to be a purely defensive strategy, but in fact, it is about *preparing for growth* when consumer and business confidence returns after the pandemic is under control (whenever that might be).
- **Soon, however, innovation, agility, intelligence, and growth will be the focus for organizations.** When the pandemic ends or at least gets under control and some kind of normal life returns, the emphasis for businesses will be on *innovation and growth*:
  - When the 353 business and IT consulting buyers were asked in December 2020 what their strategic business objectives would be "in the post-COVID-19 world" (i.e., after the pandemic is under control, and people can mix freely again), their priorities switched dramatically from cost and efficiency objectives to growth-oriented objectives.
  - The top 2 strategic business objectives during the pandemic – "make our business more efficient and profitable" and "make our business more resilient" – are set to be relegated to sixth and seventh place, respectively, after the pandemic, while the number 3 objective during the pandemic – "attract, retain, engage, and monetize customers better" – is pushed less dramatically down to fifth place.
  - The top strategic objectives of organizations in the post-COVID-19 world are around innovation and growth. Organizations told IDC in December 2020 that their top 3 strategic objectives post-COVID-19 will be to "make our business more innovative," "make faster and smarter business decisions," and "expand into new markets and/or geographies." The fourth and fifth objectives, respectively, will be to "drive revenue growth in our existing business" and "attract, retain, engage, and monetize customers better."
  - These aforementioned findings were confirmed in IDC's April 2021 *Global Buyer Perception of Digital Strategy Consulting Services Providers Survey* of 711 buyers of digital strategy consulting services, which was carried out to support this vendor assessment. In this latest survey, buyers were asked to select the most important strategic business objective for their organization in the post-COVID-19 world. The number 1 priority globally was revenue growth, followed by profitability growth, with customer experience (CX) coming in third.
  - When digital strategy consulting buyers were asked in the April 2021 survey to name the business capabilities they thought would be most important in achieving their top strategic objective in the post-COVID-19 world, the top response was "organization" (defined as "our structures, processes, workflows, etc."), the second most popular response was "service" (defined as "how we interact with our customers"), and the third most popular response was "design" (defined as "how we build offerings that customers will love to experience").

So the post-COVID-19 world – which is hopefully only a few months away – is about finding new revenue through new offerings and new channels ("make our business more innovative") and new customers, and doing all this faster than ever before, with revamped organizational structures and better customer-facing products and services. It's about expanding into new markets – whether geographic, demographic, industry, or whatever:

- The smart organizations are planning this offensive strategy now, if not already doing it. So it's important for CXOs to select consulting partners that understand both the defensive and the offensive strategies and can help them on both. It's not "one or the other" – the two strategies will overlap in 2021 and beyond. Indeed, the defensive/resilience strategy lays the foundation for the success of the "growth" strategy that will succeed it. But you would be well advised to be working on both strategies right now, and you will probably want to switch your focus from the one to the other as fast as you can when some sort of "new normality" arrives.
- Interestingly, according to the organizations that IDC polled in late 2020, technology investment priorities won't change dramatically post-COVID-19 – cloud will remain the top investment priority in the new business environment. But IoT and "edge" technologies, new agile ways of working, and process automation will become more important.

### Three Behavior Shifts That Are Already Visible

The new post-COVID-19 environment will likely see changed consumer and business behavior, partly as a result of the pandemic accelerating and prioritizing shifts in behaviors and beliefs that had already started to gather steam before the pandemic. Three notable examples are:

- There's a **huge shift to online commerce** as consumers continue to buy goods and services online and to get them delivered to their homes – sometimes because they still have little or no choice as lockdowns get reimposed. This means enterprises have to create new channels for selling to customers and to ensure that these channels come close to being as enjoyable and frictionless (and ideally more enjoyable) as the real-world channels that they are supplementing or replacing. But it also means that enterprises have to create new products and services that are more suitable for a "remote-first world" in which online commerce (at least for the moment) is the default and in which in-person commerce is a luxury that many unfortunately cannot access or afford:
  - This is not "just" about creating online buying channels, important though that is. It's also about the physical layer: How do you rework logistics and make "the last mile" successful, so that your product actually gets delivered safely and conveniently? It's also about product design and packaging: Do you have to redesign your product to make it more deliverable? How do you make your packaging attractive and yet environmentally friendly?
  - In any case, should you not be creating entirely new products, services, and experiences (either virtual or physical – or a mixture of both) to address the new expectations and behaviors of consumers and businesses that have emerged over the last year? These behaviors and attitudes may turn out to be long lived.
  - For organizations going direct to consumers (D2C) for the first time, this is about business model change – and associated cultural change – as much as it is about operating model change. That's a lot of change for organizations to absorb. Will you need business and IT consulting help with all this?
- There's a **demand for accountability and transparency** – organizations are being held to higher ethical standards, and consumers and even business buyers are increasingly claiming to make spending decisions at least in part on ethics and environmental, social, and governance (ESG) criteria. This ethical/ESG focus has been around for a while, but as new waves of consumers enter the market and start their careers, they seem to be more focused on this than the previous generations. Some questions you may need to ask are:
  - Are your offerings produced and distributed ethically? How do you treat your people and your suppliers? Do you and your suppliers have a diverse and fair employment profile? Do your factories and your distribution networks exploit people? Are your marketing materials

and adverts deemed ethical and inclusive, and do they appear in responsible media outlets?

- Do you need help to assess and benchmark yourself, to meet the new standards set by consumers and business, and to get yourself certified when you have done so?
- Linked to ethics/ESG is a **big shift to "purpose,"** and specifically to people claiming to prioritize their spend with purpose-led organizations. This is partly connected with social change such as the racial, social, and environmental justice campaigns that seemed to gain popularity and influence during 2020. It's also connected to people's wider feelings about job insecurity and unfairness in the economy, and notably it is connected with a worrying longer-term decline in the trust that people have in government. With trust in governments at low levels and continuing to fall, consumers increasingly look for ethical and moral leaderships from brands and their CEOs. Is that a good idea? Maybe not, but it nevertheless seems to be happening, and you have to deal with it:
  - This is potentially a hazard for brands, which run the risk on the one hand of being called out as hypocrites or worse by disappointed consumers and political activities and which on the other risk incurring the wrath of potentially powerful political and economic actors (as one retailer discovered when it was effectively boycotted in China early 2021 after wading into the controversy over alleged conditions in China supply chains).
  - What is your appetite for risk here? What is the potential upside of riding the wave of "purpose"? Are you riding a tiger that could throw you off its back at any time? But what are the risks and the downsides? Do you need help figuring this out? You might want to seek advice.

## What You Should Look for in a Digital Strategy Consultant in 2021

Given the likely shift in market dynamics toward an environment where innovation-fueled revenue growth becomes a more important strategic objective, many organizations will need to invest substantial sums in getting their technology, work practices, operating models, and even business models transformed. For many organizations, a consultant with experience and capabilities in technology, people, and organizational change can play an important role in creating and implementing a strategy for the future.

IDC's advice for organizations looking to use a digital strategy consulting services provider, based on conversations with enterprises during the field research for this assessment, includes the following:

- **Look for a mixture of pragmatism and strategic vision.** Particularly at a time of economic crisis, CEOs and shareholders want to see tangible results, "return on investment" ("ROI") from their spend on tech and business change. While it is important for a consulting partner to have a strong vision and point of view, you will need to have this intellectual leadership matched with actionable advice and execution and that is oriented toward your strategic needs.
- **Look for a strategic insight on technology, business, and people.** You may well need strategy advice – brand strategy, product strategy, sourcing strategy, ESG and purpose strategy, and so on, and this will likely come with significant technology implications. This business strategy insight will need to be framed in a way that ensures that the result is ground-level positive outcomes, and this requires sound understanding of the potential advantages (and risks) of technology, data, and process change. And if this change is to be successful, it will probably require changes to your organization's ways of working and even changes in the attitudes and behaviors of your employees – in other words, cultural transformation.

A great digital strategy consulting vendor will have experience and insight in all the aforementioned different dimensions of change, so look for credentials there and ask to speak to reference clients:

- **Ask to be challenged more – and every day.** This is a huge issue right now, and most of the organizations that IDC has talked to over the past year say they want to be challenged more by their digital strategy consulting partners. Even when consulting buyers say that their consultancy challenges them, they almost always add that it doesn't challenge them enough:
  - The reason is simple: the social, demographic, political, and behavioral shifts mentioned previously mean that the world seems to be turning upside down – it's as if everything is being thrown up in the air, and no one knows where the pieces will land. To deal with that uncertainty, you need to imagine what was previously the unimaginable, think what was previously unthinkable, and so on. That means challenging yourself, but it also means getting your consulting partner to challenge you constantly. If you don't do that, you risk being overwhelmed by that wave of economic and social change happening out there.
- **Look for a strategy partner that can quickly get to know you inside out – or that already does.** Ideally, your digital strategy consulting partner should know your organization better than you know yourself. This is so important for a very simple reason – in order to propose technology or process or cultural change that has a positive impact on your organization, a consultancy needs to know your organization really well. It needs to know what you are capable of doing – and what you are not capable of doing:
  - Is your organization's culture essentially conservative or radical? Do you have taboos that cannot be overcome? What kind of change would push your organization over the edge and into chaos? What kind of change would your leaders or employees either reject flat out or sabotage consciously or unconsciously? Realistically, would adopting technologies and behaviors that worked somewhere else really work for *your* organization? You and your consulting partner need to understand your capability for change at every level – senior management, middle management, shop floor, and so on.
  - Only by having your digital strategy consulting partner working its way through your organization can the partner find out these things. If the partner doesn't do that legwork, the partner's advice is not going to be practical, and it won't work.
- **Don't overpay, but look beyond the day rate for the real value of your digital strategy consulting partner.** Most organizations would like to pay less for digital strategy consulting – although one enterprise that IDC talked to actually gave its digital strategy consulting partner an unprompted out-of-contract financial bonus without being asked. But generally speaking, who wants to pay more than they think they need in order to get the job done? That explains in part why consultancies need to propose innovative payment mechanisms linked to business outcomes or that share risks and rewards and so on. Closely aligning the financial incentives of the client and the consultancy is one way to ensure that money is well spent:
  - That said, once the consultancy has proposed an innovative pricing mechanism, the client often decides that it wants good old-fashioned fixed pricing, or even time and materials (T&M). It's often a game of bluff, in which the client wants the consultancy to show it all the options, but then the client returns to its default pricing mechanisms.
  - The key thing is not to micromanage the "right" day rates or fixed pricing but to ensure that the advice you get is based not just on deep insight of your business, your industry, and your customers but on demographic, economic, political, and social trends, and of course on technology. It's about getting the right balance between cost and value delivered.
  - The key is also to ensure that the advice you buy is based on a deep understanding of your *people side*, your culture, purpose, and institutional behaviors and beliefs. Many

times during the field research for this assessment, enterprises told IDC that the advice they received was very expensive just looking at the price tag, but it was actually good value for money because it was so well crafted to their needs *and their capabilities* as an organization. That understanding and insight does not come cheap, but when it works well, it's worth the premium.

- **Look for strategy partners that can exploit their experience and global reach to bring you best practice from other industries and geographies.** One of the most important benefits that a consultancy can bring its clients is the insight that it gets from working with other clients. Sometimes these insights are a straight read-across from your peers in your industry, but sometimes they can come from a completely different industry. They are often from a different geography. Organizations that IDC talked to for this assessment highly valued this insight, and indeed one of the capabilities they prized most from their consultancy was when it could connect them directly to other clients (e.g., through dedicated conferences, interest groups, and site visits) to learn from each other.

One of the things to look in a consultancy is therefore whether it has a robust collection of client communities and whether it has multiple ways to connect you to people that you can learn from, whether they are your peers or from a totally different type of organization.

## VENDOR SUMMARY PROFILES

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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 the worldwide 2021 IDC MarketScape for digital strategy consulting services.

Accenture is one of the world's largest services companies, with approximately 540,000 employees and operations in more than 200 cities in 50 countries. Clients include 91 of the Fortune Global 100 and more than three-quarters of the Fortune Global 500.

Accenture draws upon expertise and skills across its businesses: Strategy and Consulting, which helps clients transform their organizations; Interactive, which helps clients reinvent the experiences of customers, employees, patients, and citizens; Technology, which provides IT consulting and implementation services that enable organizations to realize greater business value from technology; and Operations, which provides managed services to help clients build intelligent operating models that are agile, resilient, and able to evolve quickly.

Accenture has expertise in more than 40 industries, including automotive, banking, capital markets, chemicals, communications/media, consumer goods, energy, food and beverage, freight and logistics, health, industrial equipment/manufacturing, insurance, life sciences/pharmaceuticals, natural resources/metals and mining, retail, software/technology, travel, utilities, and public service/government.

Accenture has a wide range of global tier 1 relationships with key technology players, including Adobe, AWS, Google, Microsoft, Oracle, Salesforce, and SAP. Its Avanade joint venture, co-owned with Microsoft, delivers services around Microsoft technology (Azure).



Accenture has a number of proprietary intellectual property assets to help clients build their digital strategies, including:

- Transformation GPS, a benchmark-based predictive and prescriptive change analytics that gives clients insights and support for major transformations
- Value Insights Platform, a proprietary benchmarking tool that compares a client's financial and nonfinancial performance with that of its peers to develop insights about potential value creation areas and opportunities for improvement
- myNav, a platform to assess, design, and simulate cloud and infrastructure solutions and determine which will best fit an organization's specific business requirements
- myConcerto, an insight-driven platform to simplify and accelerate technology-led business transformation and that includes a set of diagnostic capabilities to compare a client's systems, data, processes, and people with best practices, benchmarks, and capabilities for specific industries and functions
- myIndustry, a cloud-based platform, similar to myConcerto, used to develop industry-specific solutions for industry verticals
- myDiagnostic, a platform for assessing an organization's business and IT maturity to better understand its overall strengths and potential gaps

Accenture hosts a number of industry-specific client communities, such as the Global Energy Board, the Accenture Life Sciences CEO Summit, the Digital Insurer Network, and the Accenture Global Mining Council.

Accenture has one of the world's largest innovation center networks, with more than 165 client-facing innovation-related centers globally. These include:

- Accenture Labs, which redefine the possible with applied R&D, incubating and prototyping new concepts that will have a near-term impact on clients' businesses and developing technology solutions to improve the way businesses operate
- Accenture Studios, which focus on rapid development and prototyping of applications and the design and creation of digital services and include Liquid Studios, Fjord Studios, and Operations Studios
- Accenture Innovation Centers, which include Innovation Hubs and demonstrate and scale industry and functional solutions based on emerging and advanced technologies

Key Accenture thought leadership includes the annual *Fjord Trends*, *Technology Vision*, and *Cyber Threatscape* reports.

Accenture makes a large number of digital strategy-related acquisitions annually, with too many to list here. Acquisitions since January 2020 include Future State, End-to-End Analytics, Sentelis, VanBerlo, Clarity Insights, OpusLine, Avenai, Myrtle Consulting Group, NIKE Group, Mudano, Kates Kesler, and AlphaBeta Advisors.

Accenture's open innovation networks include Project Spotlight, an immersive engagement and investment program targeting emerging technology software start-ups to help fill strategic innovation gaps for the Global 2000, and the Massachusetts Institute of Technology (MIT) and Accenture Convergence Initiative for Industry and Technology, a five-year thought leadership, research, and educational initiative.

In the social and environmental space, Accenture's capabilities include Social Innovators Accelerator, launched in 2020 during the COVID-19 pandemic, which involves Accenture teams working with partners including nonprofit organizations and clients to tackle complex societal and environmental challenges. Accenture's other socioeconomic-focused capabilities include Inclusion and Diversity consulting, New and Responsible Skilling consulting, Critical Supply Connect (a COVID-19 response capability), Responsible AI consulting, and Global Sustainability Services consulting.

Accenture says that its mission in digital strategy consulting is "to help clients capitalize on the opportunities that digital disruption creates, reinvigorate their business and operating models, and mobilize their organizations to deliver results. Our aim is to identify clear, actionable paths to achieve and sustain transformations and help C-suite executives design and execute digital strategies that drive growth."

## **Strengths**

On average, the three areas where Accenture clients commended the firm most highly were for action orientation, continuously challenging clients, and insight into clients. Comments from Accenture clients included:

- "Accenture are always action oriented. The big difference is that every time Accenture tells you something, they know what they're talking about. Their people have hands-on experience."
- "They constantly challenge us. It's not too much: we can be sensitive to being challenged, and Accenture do it very well."
- "Accenture know us very well. They've understood our internal politics, which is one of their key competencies. This is one of the main reasons why I went for Accenture, and I'm very happy with this choice."

## **Challenges**

Accenture has the opportunity to improve its perception among clients in digital innovation/creativity and in further driving measurable value.

## **Consider Accenture When**

Accenture is a good choice for organizations requiring end-to-end transformation with a broad and diverse portfolio of technology and business transformation capabilities. As one Accenture client said: "At the end of the day, consulting is about people, and the Accenture global team is really good. They offer you really strong knowledge by combining people from different backgrounds, and that combination of people is what really makes the difference."

## **Bain & Company**

According to IDC analysis and buyer perception, Bain & Company is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

Bain & Company, founded in 1973, is one of the largest private management consulting organizations globally, with around 13,000 employees based in 59 offices across 37 countries.

Bain works in 22 industries, including financial services, healthcare, energy and natural resources, advanced manufacturing and services, consumer products, retail, technology, telecommunications, and private equity.

Bain has a number of offerings to help its clients design, build, and scale their digital strategies, including:

- Radar 360 Strategy, a framework developed in collaboration with the WEF and senior executives of 40 global companies to help clients stretch their ambition and transform their business to win today and in the future, including Radar 360 Digital GPS, a diagnostic tool to assess companies' digital maturity, and Future Back Explorer, an app for clients to navigate disruption affecting their sectors
- Launchpad, a program combining design thinking, start-up methodologies, digital expertise, and a results-driven focus to help clients launch and scale new digital ventures
- Simple and Digital, an approach to deliver better customer experience at superior economics based on human-centered design, customer analytics, and a nimble IT infrastructure
- NPS Prism, a customer experience benchmarking service that allows clients to compare themselves with competitors on overall NPS and on every step of the customer journey
- Test For Results, an in-market testing approach to marketing and sales that helps optimize all steps of the funnel, improve conversion, and deliver a seamless user experience
- Supply Chain Edge, a suite of digital and analytics tools that help clients use their supply chain as a strategic weapon
- Technology and data transformation to help clients realize a digital-ready IT and data infrastructure
- ARC, a digital tool that monitors transformation progress and fosters collaboration

Vector, Bain's integrated "Digital Delivery platform," brings together the people, processes, technologies, ecosystem partnerships, and support services to help clients deliver their digital strategy. Vector includes experts, former digital and tech executives of large companies and start-ups, data scientists, designers, developers, and engineers. Vector consists of seven competences:

- **New Business Innovation:** Corporate innovation, start-up ecosystem, and VCaaS
- **Product and Experience Innovation:** Raw customer needs discovery, experience and product design, and MVP development
- **Digital Marketing:** Strategy and execution, opportunity assessment, modernized operating model, and proprietary CX
- **Advanced Analytics:** Data strategy, capability building and analytics use cases, and portfolio management and implementation
- **Automation:** Diagnostic, business case, road map and partners, and pilot and scaling
- **Enterprise Technology:** Strategy, systems and architecture, cybersecurity, operating model, cost management, delivery assurance, and M&A
- **Partnership Ecosystem:** Bain's Alliance Ecosystem of technology partners and network of advisors

Bain has a network of 13 dedicated Digital Innovation Hubs across the globe, with ideation, agile, and immersive technology rooms and space for broader collaboration and start-up networking. Beyond these hubs, each Bain office has modular spaces for hosting brainstorming and sprint sessions with clients.

Bain hosts a number of client communities. These include Bain Lounges, such as the Bain Bankers Lounge and the Bain Insurers Lounge, and Bain Circles, a regional platform for executives within an industry to share experiences.

Key annual thought leadership from Bain includes the firm's inaugural *Technology Report* in 2020, which looks at how companies are using technologies to increase resilience and accelerate growth. Bain has recently published books such as *Doing Agile Right* and regularly writes articles in journals such as the *Harvard Business Review*.

Bain works with tier 1 technology vendors including AWS, Microsoft (including Azure), Google (GCP), Salesforce, and SAP and with a curated ecosystem of 50+ technology alliance partners, like Endava and Mphasis.

Bain has made acquisitions to expand its digital capabilities. In 2020, the firm acquired QVARTZ, a Nordic consulting firm with analytics and innovation/design consulting capabilities; Pangea, an Italy-based analytics consulting firm; and Sutton Place Strategies, a deal origination tool and transaction database for private equity firms, corporate M&A teams, and deal advisors. Bain has also made minority equity investments in key tech alliance partners, such as Endava and Pricefx.

Bain's open innovation networks include the New Business Innovation capability, which encompasses an innovation ecosystem including start-ups, venture capitalists (VCs), accelerators, and incubators; Bain's Alliance Ecosystem, the company's network of third-party partnerships; and Baincubator, its corporate incubator program. Bain also has a global network of more than 300 advisors.

In the social and environmental space, Bain has dedicated practices for Sustainability and Corporate Responsibility; Diversity, Equity, and Inclusion (DEI); and Social Impact. In 2020, Bain worked with the Coalition for Farmer-Allied Intermediaries to transform and build more resilient African food systems. Bain is also a founding member of OneTen, a coalition of companies taking action to upskill, hire, and advance 1 million Black Americans over the next 10 years into family-sustaining jobs with opportunities for advancement.

Bain's mission since foundation is to "help our clients create such high levels of value that together we set new standards of excellence in our respective industries." Bain's vision is to help clients be digital winners, assisting them in conceptualizing, designing, building, and scaling digital businesses that create high levels of value and set digital standards of excellence. To do so, Bain brings Vector, an integrated platform of digital capabilities, together with a "best-of-breed ecosystem."

## Strengths

On average, the three areas where Bain reference clients commended the firm most highly were for client insight, people quality, and action orientation. Comments from Bain clients included:

- "They obviously know our industry well. They know our senior leadership; they know our strengths and our weaknesses well. And as a result, their strategy is rooted in our culture and our politics and our capabilities."
- "Bain are expensive, but they're worth it. They are very adaptive to our organizational culture. It's not like they come in and they have all the answers – they are very collaborative."
- "Bain were very effective in understanding what might be an ideal answer that takes a lot of time, versus something that can be implemented tomorrow morning. Every decision had that trade-off built in, to give us the ability to get to market quickly."

## Challenges

Bain has the opportunity to improve its perception among clients in cultural transformation and to make further progress in value for fees paid.

## Consider Bain & Company When

Bain is a good choice for organizations looking for a consulting partner that combines deep industry and client knowledge with a strong pragmatic focus. As one client said: "Bain is best at consulting in action, when launching something or creating something from nothing. There's a practicality in their thinking, which I like. I would just use them for stuff that is truly complex and has the potential to be game changing."

## BCG

According to IDC analysis and buyer perception, BCG is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

Boston Consulting Group (BCG) has offices in more than 90 cities in 50 countries with more than 22,000 employees worldwide. The firm has over 7,000 digital experts who combine business acumen, deep industry expertise, analytics, design, and implementation capabilities together to deliver high-impact results. BCG has been one of the prominent players in enterprise strategy consulting since 1963.

BCG's functional and industry expertise spans across domains such as Strategy; Growth; People and Organization; Marketing, Sales, and Pricing; M&A; Divestitures; Operations; Sustainability; and Large-Scale Change and over 20 industries including automotive, mobility, biopharmaceuticals, consumer products, retail, financial institutions, public sector, and technology, media, and telecommunications.

The firm has delivered business model transformation work for over half of its top 100 clients and has helped clients launch over 150 new ventures.

BCG's multidisciplinary digital teams combine business consultants, industry experts, and partner ecosystems across a diverse spectrum of specializations, including data scientists, engineers, designers, IT architects, and product managers. These teams work side by side with the client team from day 1 for a seamless transition. DigitalBCG subsidiaries include:

- BCG GAMMA, which deploys data scientists, technologists, product and software builders, and consultants to conceptualize, build, and deploy advanced data and analytics solutions
- BCG Platinion, where experts in IT architecture, implementation, cybersecurity, and so forth design, build, and implement client-specific resilient products, platforms, and solutions
- BCG Digital Ventures, which brings business builder experts (e.g., entrepreneurs, innovation engineers, human-centric designers, growth architects) to work with organizations to create new market opportunities and uncover new sources of competitive advantage, helping them think and act like venture capitalists
- BCG BrightHouse, which works with organizations to elevate and align cultures, strategies, and brands around their "purpose" to accelerate transformation and value creation

A sampling of BCG's proprietary IP assets in digital, technology, and analytics include:

- Catalyst Cloud, a data and artificial intelligence (AI) cloud platform that helps clients analyze and visualize data as well as manage, model, and predict outcomes
- Digital Transformation Tool, which provides data-driven analysis into success factors for digital transformations available by sector and geography
- Digital Acceleration Index (DAI), which offers objective, outside-in benchmarks of an organization's current digital maturity compared with that of peers, tracking progress and impact along their digital journey

- Key by BCG, which ensures transparency, monitoring, and value delivery for large-scale change programs
- Absorb, an employee-centric change management software that allows for targeted interventions on employee perceptions to drive successful and sustainable transformations
- BCG DAIS, a proprietary AI-enabled platform to create consistent, enterprise-ready applications
- Lighthouse, which improves corporate decision making post-COVID-19 by merging scenario planning capabilities with real-time data and dynamic forecasting models
- RADAR, a rapid assessment of digital and data platform architecture to identify and prioritize tech stack limitations

BCG has 35+ digital centers globally that offer immersive client experiences including DigitalBCG Immersion Centers, Innovation Center for Operations (ICOs), BCG Digital Ventures Innovation Centers, BCG Platiniom Design Studios, an AWS and BCG Digital Builders Showroom, the BCG Tech Hub, and Cybersecurity hubs.

BCG hosts several client communities including a CEO Forum, a CFO Forum, the BCG Digital Transformation Network, and a Chief Transformation Officer Network; around 15 BCG-hosted industry client communities; and another 10+ functional-focused client networks including communities around supply chain and procurement.

Thought leadership from BCG includes the annual *Most Innovative Company Annual Report*, *AI x MIT Annual Report*, and *Digital Acceleration Index Annual Report*. BCG employees have also published numerous articles in publications such as the *Harvard Business Review* and *MIT Sloan Management Review* and on LinkedIn and other social platforms, as well as several books, including *Beyond Great* in October 2020.

BCG's partnership ecosystem includes more than 160 organizations to find collaborative solutions for clients, including "Platinum equivalent" alliances with Adobe, AWS, Microsoft (including Azure), Google (including GCP), SAP, and Salesforce.

BCG focuses on organic growth and makes relatively few acquisitions; however, BCG acquired quantLab in October 2020 – a team of quant data scientists dedicated to high standards of analytical and technical skills and business expertise.

BCG also maintains relationships with Hello Tomorrow, Silicon Foundry, and B Capital.

In the social and environmental space, BCG's offerings include Social Impact and Sustainability consulting, Responsible AI consulting, CodeCarbon (an open source tool to track and reduce carbon footprints), FACET (an open source software library for human-explainable AI), OpenSC (a blockchain platform to track environmental and ethical impact of food and products), Diversity and Inclusion consulting, and Climate and Sustainability consulting.

BCG's purpose is "to unlock the potential of those who advance the world – this extends to DigitalBCG where the firm works with clients to establish a bold vision, build digital capabilities, and enable new ways of working that power growth, innovation, and resilience and create value that lasts."

## Strengths

On average, the three areas where BCG reference clients commended the firm most highly were for client insight, ability to drive measurable value, and continuously challenging the client. Comments from BCG clients included:

- "BCG's understanding of the big picture and the cultural aspects is excellent, their partners' understanding of us is really good, and their ability to deal with touch points right across the organization was important to our success."
- "They are amazing at driving real, innovative transformational change; understanding the value chain; identifying opportunities for innovation, quick delivery; and working towards scaling."
- "What I love about BCG is that they push and challenge us, but they do it knowing what will work and what won't work and knowing the networks and landscape of people in our organization."

## Challenges

BCG has the opportunity to improve its perception among clients in action orientation and to make further progress in value for fees paid.

## Consider BCG When

BCG is a good choice for organizations looking for a consulting partner to help drive major strategic change. As one BCG client said: "The larger the project, the larger the scale and impact, the more BCG can help. The more board members, the bigger the problem, the better they are."

## Capgemini

According to IDC analysis and buyer perception, Capgemini is positioned in the Major Players category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

Capgemini is a France-based global consulting, outsourcing, and IT services vendor with around 270,000 employees serving clients in almost 50 countries in the Americas, Europe, Asia/Pacific, Africa, and the Middle East.

Capgemini's key service lines are Strategy and Transformation, Applications and Technology, Operations and Engineering, and Capgemini Invent. The latter is the strategy and transformation arm of the group. It supplies digital strategy consulting and related professional services, including design and data science services.

Capgemini serves some 20 industries. Several industries targeted in particular by Capgemini Invent are consumer products and retail, financial services, telecommunications, media and entertainment, manufacturing, automotive, life sciences, and energy, utilities, and chemicals.

Capgemini Invent's capabilities include:

- Brand and Experience, including brand consulting, digital marketing, marketing transformation, customer experience transformation, and experience design
- Future of Technology, including digital IT acceleration, digital "new" services and platforms, digital architecture, and trust
- Innovation and Strategy, including strategy, innovation, and business and operating models

- Insight-Driven Enterprise, which includes AI and automation strategy, insight-driven business innovation, and data, risk, and regulatory
- Operations Transformation, including digital engineering and asset management, digital manufacturing, supply chain, process optimization, and finance transformation
- People and Organization, including future leadership and talent, organizational dexterity, change acceleration, and future HR

Capgemini's client-facing innovation network includes:

- 40+ Creative studios around the world generate insights, sketches, wireframes, renderings, prototypes, films, and complete digital and physical designs focused on delighting customers and delivering new sources of business.
- Applied Innovation Exchanges (AIE) located in 13 countries bring together a robust innovation framework, a curated open innovation approach, and a global network to deliver cross-geography and cross-industry perspectives. This ecosystem of start-ups, venture capitalists, academic and alliance partners, sourcing accelerators, and more connects with clients to accelerate the application of innovation.
- Accelerated Solutions Environment (ASE) DesignSessions are one- to three-day innovation events where Capgemini teams work with clients to drive technology-enabled business change.
- Acceleration Zones are custom-built pop-up collaborative workspaces created by ASE teams working onsite at clients' locations.
- Through the acquisition of Cambridge Consultants, Capgemini now has more than 20,000 sq m of state-of-the-art R&D facilities, with over 100 fully equipped labs, design offices, and workshops. These facilities deliver over 500 scientific, engineering, and design projects each year and have delivered over 5,000 patents to date.

Capgemini Invent has a number of key intellectual property assets to help its clients build their digital strategies, including:

- Digital Maturity Assessment (DMA), a tool that helps clients assess the current state and level of their overall digital maturity
- The Money, Magic, and Machines framework and approach, which pairs business acumen and consumer empathy with technical expertise to help clients launch new products and businesses
- Minimum Viable Organization (MVO) approach – rather than creating one final organization structure, Capgemini creates multiple MVOs during the iterative approach to derive at the right fit of organization structure
- 890 by Capgemini, which accelerates the AI/analytics journey for clients and comes with Data Exchange, Insights Exchange, and Outcome Exchange (These exchanges enable organizations to select carefully curated sectorwise/domainwise solutions and, with minor updates for data sources, can be enabled and go live.)
- Integrated Product Support and Sustaining Services Platform (IPS3), a platform providing visibility and control of business service levels
- EAPM, an AI-enabled portfolio management software tool that provides a detailed digital model of a client's application portfolio landscape and evaluates the health of the portfolio against benchmarks from hundreds of engagements



- Triage and Analytics Framework (iTAF), a machine data analytics framework that provides proactive diagnostic and preventive analysis
- Capgemini Intelligent Automation Platform, a cloud-ready, technology-neutral, plug-and-play platform designed to take clients from limited deployments and proofs of concept (POCs) to intelligent automation at scale

Capgemini hosts a number of client communities. The Capgemini Research Institute's (CRI's) new journal, *Conversations for Tomorrow*, brings together voices from business, academia, and government to discuss the major strategic imperatives that are shaping the future of business and society.

Capgemini Invent has alliances with tier 1 technology providers including Adobe, AWS, Google, Microsoft/Azure, Oracle, SAP, and Salesforce.

The Capgemini Research Institute produces annual reports such as the *World Energy Markets Observatory* and the *World Retail Banking Report* (with Efma). The CRI also has an ongoing relationship with Massachusetts Institute of Technology, producing multiple studies, including the most recent report titled *Lifting the Lid on Corporate Innovation in the Digital Age*.

Key Capgemini clients in the digital strategy consulting space include Barclays, Orange, Audi, Airbus, Google, Diageo, Nike, Coca-Cola, Dräger, Pfizer, and Cisco.

In the social and environmental space, Capgemini's work includes consulting on environmental, social, and governance issues such as sustainability and social purpose. In 2020, Capgemini bought Purpose, a "social impact agency and campaign innovation hub," giving it new capabilities in purpose-driven campaigns, branding, creative content, and participatory social impact strategies.

In addition to Purpose, recent acquisitions include RXP Services, an Australia-based digital services consultancy provider bought in early 2021; frog, a design consultancy that joined Capgemini as part of the Altran acquisition in 2020; and Cambridge Consulting, which also joined as part of Altran.

Capgemini says that its mission in digital strategy consulting is "to help business leaders find new sources of value by combining strategy, technology, data science, and creative design to solve organizations' most complex business and technology challenges. Capgemini accelerates the process of turning ideas into prototypes and scalable real-world solutions for clients. The result is a coordinated approach to transformation, enabling businesses to create the products, services, customer experiences, and business models of the future."

Note that the assessment for Capgemini in this document is based on publicly available data and information obtained via desk research, company briefings not specific to this assessment, field surveys of consultancy buyers, conversations with non-reference clients, and input from Capgemini for the previous (2019) version of this assessment.

## Strengths

Based on data from IDC's global field survey of digital strategy consulting buyers, supplemented by conversations with organizations that have used Capgemini for consulting services in the past, areas of strength for Capgemini are people quality, action orientation, and value delivered for fees paid.

## Challenges

Based on the evidence sources described previously, Capgemini has the opportunity to improve its perception among clients in client empowerment and driving cultural transformation.

## Consider Capgemini When

Capgemini is a good choice for organizations looking for a partner with strong IT consulting skills and a good understanding of the connection between business and technology drivers. As one former Capgemini client said: "When I worked with Capgemini, they were really there to help me to get the business aligned and on board. Capgemini were really invested in our business, and they were embedded with our organization."

## CGI

According to IDC analysis and buyer perception, CGI is positioned in the Major Players category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

CGI is a Canada-based services company founded in 1976 with 76,000 employees across 400 locations worldwide.

CGI's go-to-market approach is to be "decentralized by metro market," meaning that the company is focused on providing onshore-based physical proximity in order to facilitate client intimacy. CGI has identified around 200 key metro markets in 40 countries globally and is building critical mass in these target metros both organically and by acquisition.

CGI addresses 10 industries and 32 subindustries. Most CGI employees have an industry focus with the exception of staff in some delivery centers, some of the company's 68 Emerging Technology Practices, and some functional-based practices. Of the 68 Emerging Technology Practices, 46 have dedicated teams and 22 have virtual practices. More than two-thirds of CGI's digital strategy consultants have an industry specialization and belong to a vertical industry organization with the company.

CGI has a number of key intellectual property assets to help its clients build their digital strategies, including:

- Lean Agile DevOps at Scale (LADx), a proprietary framework that helps CGI clients understand business complexities and design solutions from the earliest stages of a project
- CGI AgileIQ Suite, an integrated set of tools that enable teams to define, build, test, and deliver applications
- CGI Unify360, a portfolio of consulting services, frameworks, and practices needed to understand an organization's IT portfolio and create strategies that align IT to business objectives
- CGI's Voice of Our Clients benchmark, where CGI has created a knowledge base of insights from 5,500 clients in countries representing 82% of the world's digital spend, comprising around 1 million structured and unstructured data points from face-to-face conversations with 1,500 executives each year (The benchmark covers 21 industry segments.)
- Management Foundation, a companywide repository of frameworks, processes, best practices, and measures to drive consistency, agility, and alignment across client delivery
- Strata Enterprise, a decision management tool that helps organizations make profitable and efficient decisions throughout the customer life cycle and across the enterprise
- Client Partnership Management Framework, an operating framework that delivers common practices across multidisciplinary teams of professionals to drive accelerated delivery and continuous efficiency gains and cost savings for clients

CGI has special interest groups dedicated to its major subsegments (e.g., grocery or fashion within retail) and holds roundtables, innovation workshops, and presentations with clients' executives around their business concerns. These groups, usually composed of clients that do not generally compete with each other, give feedback and influence the company's investment strategy (e.g., the Retail, Consumer, and Services special interest group prompted the creation of CGI's Retail Innovation Center in Lille, France, and the group acts as an advisory board for the center).

CGI has 14 Innovation Centers globally, including 3 newly opened in Munich, Germany; Stockholm, Sweden; and London. The Montreal center in Canada is the flagship with a design studio and emerging technology showcase; the Lyon center in France acts as an industry innovation lab for manufacturing and has a fully configured integrated supply chain, while the Gloucester center, located near the United Kingdom's GCHQ intelligence agency, is a secure innovation lab with studio for leading-edge technologies. Globally, the innovation centers and emerging technology practices represent 2,600 employees.

Key annual thought leadership from CGI includes the *Insights to Action* report, based in part on conversations with CGI's clients; the *Transaction Banking Survey*; and the recently commenced annual *Mobility Observatory Survey* benchmarking mobility as a service (MaaS) in 40 cities in France.

CGI has made 89 acquisitions since going public in 1986, including 12 since 2018. Notable acquisitions included AMS in 2004, Stanley in 2010, and Logica in 2012, with the latter significantly expanding CGI's footprint in the United Kingdom, France and Continental Europe, and Australia. Recent acquisitions include Swedish services company Acando in 2019 and Sunflower Systems in 2020.

CGI has global partnerships with tier 1 technology vendors including Adobe, AWS, Google, Microsoft, Salesforce, and SAP.

CGI clients include Shell, OP Financial Group, the U.S. Department of Defense, National Bank of Canada, Carrefour, and the European Space Agency.

In the social and environmental space, CGI's work includes a Sustainability Strategy Consulting offering created after the acquisition of Acando and the company's "Handi-Ready" offering, which aims to create work opportunities for people with disabilities in IT and digital professions.

CGI says that its mission in digital strategy consulting is: "Clients trust us to deliver business-critical solutions that enable their digital success. We bring insights they can act on based on facts, not hype. Our consulting expertise helps clients achieve value-added change, and our technology skills and understanding of their enterprise landscape help them bridge the old to the new. Through our industry experience and proximity model, we provide the business and cultural focus required to connect sustainable strategy and agile delivery to tangible outcomes."

## Strengths

On average, the three areas where CGI reference clients commended the firm most highly were for insight into clients, action orientation, and people quality. Comments from CGI clients included:

- "CGI are really good at understanding us; they adapted well to our context, which is very political. We had a lot of changes to our internal organization, and they adapted well to these changes."
- "CGI don't bring me something that's generic. They really work on adapting their approach to our specific strategic needs; their advice is very specific."

- "The work we've done with CGI's digital strategy consultants has been excellent. They worked hard to develop our digital strategy and take it from theory to practical implementation."

## Challenges

CGI has the opportunity to improve its perception among clients in digital innovation/creativity and client empowerment.

## Consider CGI When

CGI is a good choice for organizations looking for a pragmatic and action-oriented consultant with a strong focus on technology transformation. As one CGI client put it: "They are really good at aligning their interests with ours; they work hard seven days a week. The insight that CGI gave me helped me to build my three-year strategic plan. It was not just a report; it was really on point."

## Deloitte

According to IDC analysis and buyer perception, Deloitte is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

Deloitte is a 176-year-old global network of multidisciplinary professional services firm with approximately 245,000 people in 150 countries and territories. Deloitte Digital, created in 2008, has approximately 16,000 employees globally, with around 9,000 in the Americas; 4,100 in Europe, the Middle East, and Africa; and around 2,900 employees in Asia/Pacific.

Industries served by Deloitte and Deloitte Digital include consumer; energy, resources, and industrials; financial services; government and public services; life sciences and healthcare; and technology, media, and telecommunications.

Globally, Deloitte has five consulting offering portfolios: Strategy, Analytics, and M&A; Customer and Marketing; Core Business Operations; Enterprise Operations; and Human Capital. Deloitte's Digital Strategy practice includes multiple offerings, each with its own dedicated staff of partners and professionals, spanning four core areas: Enterprise Strategy, Customer Strategy, Operations Strategy, and Human Capital Strategy.

Deloitte's global network of client-facing innovation centers include:

- More than 60 Digital Studios in 29 countries globally, where Deloitte professionals work with clients to define and deliver digital experiences and to help clients develop and execute on their digital ambitions
- More than 58 physical and virtual Deloitte Greenhouse facilities globally (These are locations that allow clients to ideate, innovate, and tackle their biggest challenges through interactive workshops in specially designed environments.)
- Discovery Labs, which combine an immersive tour with a facilitated workshop to help clients prioritize digital transformation investments
- Deloitte InsightStudio in the Americas and virtually, a rapid incubator to help clients turn ideas into business outcomes quickly
- Deloitte Industry-Specific Hubs, such as the Deloitte Center for Energy Solutions Lab and The Clerk & Green Retail Store

- Other innovation facilities including Digital Factories and Innovation Garages, Blockchain Labs, an MIT Media Lab partnership, a Center for Consumer Insights, and the Deloitte Neuroscience Institute

Deloitte has a number of key intellectual property assets to help its clients build their digital strategies, including:

- Human Experience marketing platform (Hux), a software and services platform that helps clients create more personalized, contextualized, and memorable end-to-end experiences for individuals at scale
- ConvergeHEALTH, a suite of Life Sciences and Health Care solutions to enable more successful outcomes for patients while providing faster insights and better decisions through data-driven digital and analytics platforms
- MyPath, a tool for health and connected care to enhance the patient experience, improve adherence, and generate a longitudinal, real-world data set for insights
- Polaris, a revenue management analytics solution to drive smarter pricing and profitability decisions at multiple levels
- Trustworthy AI, an AI framework to responsibly harness the power of AI
- PredictRisk, a proprietary data- and machine learning (ML)-driven risk prediction platform that is leveraged across a variety of use cases
- Opioid360, an opioid risk evaluation and avoidance information solution for the government, public services, and healthcare sectors built on the PredictRisk platform
- Platforms and Hybrid Solutions, a suite of data-powered and industry-tailored accelerators, solutions, and products to address complex business issues

Key annual thought leadership from Deloitte includes the *Tech Trends* report, now in its 12th year. *Tech Trends* explores a series of key new technology-related trends that have the capability of driving significant business value for organizations.

Deloitte has a range of alliances with tier 1 technology vendors including Adobe, AWS, Google, Microsoft/Azure, Salesforce, and SAP.

Deloitte's open innovation networks include the Deloitte Catalyst network, which helps connect clients to innovative start-ups.

Key Deloitte clients include American Express, Casey's General Store, Caterpillar, Chipotle, CYBG, Enterprise Holdings, KC Chiefs, Network Rail, Qantas, and Verizon.

In the social and environmental space, Deloitte's work includes consulting around environmental, social, and governance issues, including risks and sustainability, and consulting services around diversity, equity, inclusion issues.

From time to time, Deloitte makes acquisitions to strengthen its digital strategy capabilities. In 2020, for instance, Deloitte bought United Kingdom-based SAP specialist consultancy Keytree.

Deloitte hosts a number of client communities, such as CIO Peer Circles (small gatherings that give CIOs the opportunity to engage with their peers who are experiencing similar challenges) and Deloitte's Women in Technology network.

Deloitte did not submit a mission statement for this document.

Note that the assessment in this document for Deloitte is based on publicly available data and information obtained via desk research, company briefings not specific to this assessment, field surveys of consultancy buyers, conversations with non-reference clients, and input from Deloitte for the previous (2019) version of this assessment.

## **Strengths**

Based on data from IDC's global field survey of digital strategy consulting buyers, supplemented by conversations with organizations that have used Deloitte for consulting services in the past, areas of strength for Deloitte are action orientation, people quality, and client insight.

## **Challenges**

Based on the evidence sources described previously, Deloitte has the opportunity to improve its perception among clients in client empowerment and in further driving measurable value.

## **Consider Deloitte When**

Deloitte is a good choice for organizations looking for an action-oriented partner with broad and deep business and technology skills and a strong understanding of clients. As one of Deloitte's clients said: "If I'm looking for strategic advice, I'd look to Deloitte. They are really innovative in some of their approaches, and they have strong global networks."

## **EY**

According to IDC analysis and buyer perception, EY is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

EY is a multidisciplinary professional firm present in over 150 countries globally. The firm has more than 16,000 people across the world supporting its digital consulting work.

EY does not have a separate "digital" brand or organization but rather embeds digital transformation capabilities across its four global service lines:

- **Strategy and Transactions** – Strategy consulting services provided by EY-Parthenon, one of the largest global strategy consulting organizations with more than 6,500 professionals, providing advice to clients around strategic growth initiatives, mergers, restructuring, and acquisitions
- **Consulting** – Consulting services around strategy, customer and growth, transformation and innovation, operations and supply chain, technology, finance, analytics, risk, privacy and cyber, and people advisory services
- **Assurance** – Providing services to clients around digital trust (e.g., audit, fraud investigation, risk assurance, and cybersecurity)
- **Tax** – Providing services relating to the tax implications of a digital transformation (e.g., changes to tax legislation resulting from the digital economy)

Industries served include financial services, healthcare, travel and hospitality, technology, media and entertainment, consumer products/retail, chemicals, and public sector services, among others.

EY has alliances and partnerships with tier 1 technology vendors including Adobe, Microsoft, IBM, and SAP. EY can provide consulting on services around Amazon, Google, Oracle, and Salesforce technologies, but it does not go to market with these vendors as they are EY audit clients.

EY has a global network of 46 "wavespace"-branded innovation spaces where the firm works with clients to innovate and cocreate new offerings and CX-related assets. Each wavespace center is made up of distinct environments including Design Studio, Tech Demos/Showcase, Lab/Incubator, and Workshop. EY also delivers wavespace experience sessions as "pop-ups" on client sites and has several clients to whom it is wavespace as a service, which involves designing, building, and operating a wavespace for the client. In early 2020, the firm developed a suite of virtualized wavespace services to allow clients to experience wavespace-based innovation remotely.

Key annual thought leadership from EY includes *EY Megatrends*, a global report that aims to expose business leaders to trends and forces far outside their usual scope of analysis, and EY's *Global Information Security Survey*, a long-standing annual analysis of the state of cybersecurity.

Key EY clients include Carrier, Xcel Energy, Royal Caribbean, Miami Heat, National Health Service (NHS), and Tenaga Nasional Berhad (TNB).

EY has a number of key intellectual property assets to help its clients build their digital strategies, including:

- EY Drive, a web-based business case modeling tool that helps clients structure the business case for change, track and analyze benefits and costs, visualize structures for decision making, and analyze results dynamically
- EY's Experience Calculator, which helps clients define their future-state experience with an understanding of how everything will fit into the overall business solution
- EYsight, a data-driven insight platform that continually ingests large amounts of external data and serves insights to help business decision makers navigate fast-changing environments
- EY TechWatch, an interactive tech and innovation trends insights platform that provides a single source of information on the emerging tech landscape across horizons
- EY VentureBuilder, an innovation road mapping tool to shorten innovation cycles for new products, services, and ventures
- EY CogniStreamer, a collaborative innovation platform where users join forces to create, assess, and select innovative ideas within strategically selected areas
- EY Digital Business Readiness Assessment (DRA), an online interactive assessment and benchmarking tool that enables clients to benchmark their digital maturity
- Smart Experience (SMX), an AI as a service building personalized offers, actions, and experiences orchestrated using EY's technology partners

EY's open innovation networks include InnVenture, an internal ecosystem connecting EY clients to innovators and creative professionals across the global firm, and the EY Foundry, a dedicated virtual incubator operating across Australia, New Zealand, and selected ASEAN markets.

EY has been focused more on organic growth rather than on inorganic growth but has made several recent acquisitions in the technology and digital consulting space. Most recently, in November 2020, EY bought Zilker Technology, a digital consultancy and systems integrator focused on customer experience. Other acquisitions in 2020 included Inter-Cultura (a customer and user experience consultancy in Argentina), Doberman Group (a Swedish customer and design firm), and Spotmentor Technologies (a machine learning- and AI-enabled digital learning technology platform out of India).

EY hosts a number of industry-focused client communities to share knowledge and insights among its clients. These include EY Innovation Studio (experience convenes C-level or equivalent stakeholders

across the food and agriculture ecosystem), EY Smart Health, the Dow & EY Customer Experience consortium (which brings together companies to consider how to more effectively measure customer experience and determine the impact it has on operational and financial performance), and the CNBC Business Interrupted partnership.

In the social and environmental space, EY's offerings include Climate Change and Sustainability consulting; Generation Z consulting; Identify, Trace, Respond (ITR) consulting; EY's Neurodiversity Centers of Excellence; and EY's Sustainable Impact Hub.

EY says that its mission in the digital transformation space is: "EY helps businesses apply the experience and technologies that help them capitalize on digital's promise faster, and with less risk. Digital transformation strategy seeks to unlock human potential, innovate at scale across the organization, and use technology to accelerate new and better ways of working. EY helps clients accelerate ahead of the speed of change by looking beyond the next round of digital 'products,' helping them learn to reimagine their ways of working, organizational structures, talent strategies, and more."

### **Strengths**

On average, the three areas where EY reference clients commended the firm most highly were for client empowerment, value for fees paid, and cultural transformation. Comments from EY clients included:

- "EY are exceptional in ensuring that the projects they work on are wrapped up properly. They do a really great job of knowledge transfer when resources are fluctuating – they definitely do a good job there."
- "The institutional knowledge of our organizations and the deep familiarity with our business that EY has saves us money. Everything they give us is actionable because they have a deep understanding of our technology, our people, and our vision."
- "The effect of agile on our organization was huge. We hit the ground running, and that was one of the reasons we had the success we did. EY drove that agility within our organization, and I'm impressed by them."

### **Challenges**

EY has the opportunity to improve its perception among clients in digital innovation/creativity and challenging the client.

### **Consider EY When**

EY is a good fit for organizations looking for a business consultancy with a strong focus on client value and the human side of transformation. As one EY client said: "The ideas that EY bring and the quality of their work is always top notch; I'd put them in front of our people any day of the week with full confidence in what they present. They have a truly distinctive culture in that they put the client first."

### **IBM**

According to IDC analysis and buyer perception, IBM is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

IBM's digital strategy consulting is led by IBM Enterprise Strategy working with the company's iX and cognitive service lines as part of IBM Services. Enterprise Strategy and its related practices help



clients reinvent themselves by designing executable business strategies using multidisciplinary teams from across IBM.

IBM Enterprise Strategy and IBM iX have 17,000 consultants working in the strategy, technology, and creativity domains around the world in combination with others from IBM's cognitive service lines. IBM Enterprise Strategy is made up of four key practices:

- Digital Business Strategy, which creates, visualizes, and achieves strategies that enable modern business reinvention
- Connected Operations Strategy, which applies digital and emerging technologies for improved productivity and efficiency
- Tech and Data Strategy, which helps organizations transform and modernize their operating models around agile, data-driven business and technology strategy, and emerging technology incubation and adoption
- Talent Transformation Strategy, which helps clients build more competitive, nimble organizations

Enterprise Strategy spans seven main regions: North America, Europe, Japan, Asia/Pacific, Greater China Group, Latin America, and the Middle East and Africa. Overall, IBM operates in 175 countries and serves 19 industries aligned within 5 key sectors: communications, distribution, financial services, industrial, and the public sector.

IBM has a wide range of global tier 1 relationships with key technology players, including Adobe, AWS, Google, Microsoft, Oracle, Salesforce, and SAP. IBM also has a consulting alliance with EY, and its Red Hat cloud business has a global network of services partners.

IBM has a large global network of innovation centers in which it hosts and/or collaborates with clients, including:

- 52 Client Innovation Centers (CICs), which provide agile, accelerated POC/MVP development services that can be extended to operationalize and scale strategies
- 50+ Studios, which use a global network of strategists, designers, developers, and data architects, and industry and ISV expertise
- 12 Research Labs across six continents, including over 3,000 researchers spanning AI, Blockchain, Quantum Computing, IoT, and Security

Key IBM clients in the digital strategy consulting space include Samsung, Shell, Vodafone, and Home Depot, among numerous other large enterprises globally.

IBM has a number of key intellectual property assets to help its clients build their digital strategies, including:

- Component Business Model (CBM.ai), an AI-powered asset that provides business component frameworks, performance benchmarks, and aligned offerings for 80+ industries
- Digital Maturity Assessment Tool (DMAT), a web-based tool to assess clients' maturity across 45 best practice standards that define a modern digital enterprise
- IBV performance benchmarking data, a mix of proprietary and third-party benchmarking data across industries, functions, and topics

- Business Value Model, which helps quantify the expected business impact of large digital transformation efforts
- Value Orchestration offering, a governance framework for defining, measuring, guiding, and realizing business value through end-to-end transformations
- Industry-specific reference architectures, solutions, and code patterns to help accelerate design and testing of new digital strategies and transformation programs
- Prebuilt accelerators and assets for industries and functions, such as a blockchain food supply chain solution and telecom-focused AI chatbots
- Diligence Edge, an IBM Watson-powered M&A due diligence tool, launched together with EY, that surfaces insights around diligence topics

IBM's open innovation networks include the firm's Ventures, Ecosystem, and Acquisitions organization, which develops a network of key ecosystem partners and IBM account and service line leaders to collaborate and bring innovation to clients.

IBM hosts a number of client communities, including focused sessions at its annual Think client event as well as at industry events including Mobile World Congress, SDN NFV World Congress, and CES.

IBM publishes recurring research and thought leadership, including the annual *CEO Study*, which draws on surveys and interviews with more than 3,000 CEOs and public sector leaders around the world. IBM employees have recently written articles for publications such as the *Harvard Business Review* and *Forbes*.

Recent acquisitions since the beginning of 2020 include 7Summits, a North American Salesforce consultancy; Waeg, a European Salesforce consultancy; Nordcloud, a European cloud implementation, application transformation, and managed services company; Taos, a North American cloud professional and managed services company; and TruQua, an IT services and consultancy SAP development partner.

In the social and environmental space, IBM's work includes consulting around sustainability strategy and around the future of work, addressing the lasting impacts of COVID-19. In 2020, IBM played a key role in the COVID-19 High Performance Computing Consortium. IBM also hosts events such as the Virtual Hispanic Jam, which brought together Hispanic leaders.

IBM says that its mission in the digital strategy consulting space is "to help clients apply AI and cloud to solve their most important strategic challenges and transform their businesses. They guide the 'North Star' vision, value orchestration, and change management across large-scale client transformations, differentiating based on their ability to span the thinking and doing, helping clients apply analytics, exponential technologies, and agile work models to drive impact at speed and scale."

## Strengths

On average, the three areas where IBM reference clients commended the firm most highly were for client insight, value for fees paid, and people quality. Comments from IBM clients included:

- "IBM know more about our organization than I do. They understand our stakeholders and the way we work very well, and they always come with a viewpoint based on experience."
- "IBM's methodology is well designed and gets us coming out of the gate pretty fast. They are aligned with our strategy, and right from the start they work fast on use cases and on cocreation."

- "We're a very traditional organization, but we are now in one of the most recognized digital transformations in our country. This is thanks to the help that I got from IBM."

## Challenges

IBM has the opportunity to improve its perception among clients in driving cultural transformation and in continuously challenging the client.

## Consider IBM When

IBM is a good choice fit for organizations looking for a partner to drive both technology and business change, based on deep skills and strong understanding of the client. As one IBM client said: "For me, there is a real value added in that IBM knows about digital transformation, agile at scale, and technology – they understand both the agile and cultural transformation but also the IT strategy. This is a differentiator for IBM."

## KPMG

According to IDC analysis and buyer perception, KPMG is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

KPMG has around 32,000 professionals with digital strategy and transformation experience globally, including 12,500 data scientists, engineers, and technology specialists. These professionals are drawn from several capabilities within KPMG, including the Global Strategy Group, the Global Management consulting team, the Global Digital Lighthouse team (KPMG's center of excellence for data-driven technology, which includes about 2,800 people), and Deal Advisory Analytics. Functional specialization includes strategy definition, change design, transformation management and due diligence, sales and marketing, finance, supply chain, and HR.

KPMG works in around 22 industries, including energy and natural resources, financial services, government and public sector, healthcare, life sciences, industrial manufacturing, technology, telecommunications, and transport and logistics.

KPMG has a number of key intellectual property assets to help its clients build their digital strategies, including:

- Connected Enterprise, KPMG's suite of framework, methods, and assets for transformation focusing on critical capabilities that underpin successful digital transformation
- KPMG Ignite, the firm's patented global AI platform, which is used for agile development of use cases and for implementations leveraging MVP approaches
- KPMG Insight, an analytics platform that was originally built for M&A situations and is now also frequently used for proof-of-concept applications
- KPMG Intelligence, a cloud-based platform that leverages extensive transaction data and business-critical benchmarks plus public data from sector-specific sources
- KPMG Tiles, a suite of 257 analytics "apps" for rapid performance analyses and benchmarking tailored for 13 industry sectors
- KPMG's proprietary approach leveraging advanced data and tools and the global node network, called Sensory Advantage Ecosystem (SAE)
- KPMG Signals Repository, the firm's global data and analytics platform, which tracks 55,000 market trends continuously

- KPMG's KODA, a labor cost analytics, design, and visualization solution that delivers in-depth organization analysis and supports organization design

KPMG hosts a number of client communities, including virtual monthly calls with Fortune 500 clients in global business services industry consortiums; virtual monthly calls with a consortium of Fortune 500 clients; Financial Services Forum, a quarterly basis gathering of industry leaders; the Annual Energy Conference around the health and future of the industry; the Consumer Goods Forum and regular roundtables in the pharmaceutical and chemicals industries.

KPMG has a global network of around 39 Ignition Centers, which are physical spaces where KPMG and clients ideate and create innovative offerings. Ignition Centers are modular in design:

- Innovation Labs help clients innovate for future growth and relevance by using strategic research and methodologies powered by design thinking. Capabilities include research and ideation, hypotheses generation, experimentation, meetups and start-up events, and co-innovation.
- Digital Insights Centers are high-tech collaborative environments where KPMG and clients explore data-driven technologies and analytics solutions. These centers also showcase the firm's capabilities in data, AI, and emerging technologies.
- KPMG's rapid prototyping environment, The Garage, is a facilitated environment where Ignition teams and clients strategize, design, prototype, test, and implement ideas with emerging technologies.

Key annual thought leadership from KPMG includes the global *Harvey Nash/KPMG CIO Survey* and the *KPMG CEO Outlook*.

KPMG has alliances and partnerships with tier 1 technology vendors including AWS, Microsoft (including Azure), Google, Oracle, and Salesforce. KPMG supplies consulting and implementation services around Adobe and SAP technologies, but it does not go to market with these vendors as they are KPMG audit clients.

From time to time, KPMG makes tuck-in acquisitions to strengthen its capabilities in the digital space. Acquisitions since the beginning of 2020 include Wirefire Creative, a Canada-based ServiceNow partner; Future Analytics, an Ireland-based urban planning, economics, and applied research consultancy; and Shivansh Solutions, an India-based SAP consulting firm.

KPMG's open innovation networks include the firm's Sensory Advantage Ecosystem, a global network that helps the firm proactively identify early marketplace trends and conducts research to prioritize emerging trends and areas for strategic investment.

In the social and environmental space, KPMG's work includes KPMG IMPACT, which brings together experienced professionals to address the biggest issues facing the planet. In the United States, KPMG's Data Citizens with Purpose (DCwP) program works with nonprofit organizations, providing volunteer hours and data and analytics capabilities.

KPMG says that its mission in digital strategy consulting is "to help clients thrive in a rapidly digitizing world by leveraging the full power of digital technologies to improve and transform their business. From strategy through execution, KPMG professionals combine industry, functional, and technology depth with an ability to work with people at all levels, connecting the front, middle, and back office to capture substantial and lasting benefits. KPMG's proprietary digital platform assets, client co-innovation

approach, and vibrant ecosystem of partners ensure sustainable transformation results and a better experience."

## **Strengths**

On average, the three areas where KPMG reference clients commended the firm most highly were for ability to drive measurable business value, people quality, and driving cultural transformation.

Comments from KPMG clients included:

- "KPMG have been our partner on our hardest transformational projects, and they have always delivered for us."
- "KPMG are outcome driven and focused on outcomes, willing to go the extra mile. They're very practical and down to earth; they don't try to dazzle you."
- "To make people digital native is hard, but KPMG have done a good job. They've done it through small hypotheses and test cases, showing our people and demonstrating the value."

## **Challenges**

KPMG has the opportunity to improve its perception among clients in client insight and in action orientation.

## **Consider KPMG When**

KPMG is a good choice for organizations looking for a strong consulting partner to help them drive challenging organizational and people change. As one client put it: "KPMG's sweet spot is business analytics, data science, and large-scale transformation – they're most able to help us with high-value consulting, organizational integration, and work with a heavy industry component."

## **McKinsey**

According to IDC analysis and buyer perception, McKinsey is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

McKinsey, founded in 1926, is one of the largest and oldest management consulting firms globally, with more than 33,000 employees in 133 cities across 67 countries. McKinsey works with more than 2,000 institutions, including 90 of the top 100 corporations worldwide.

McKinsey's client service model is organized primarily by vertical industry, with functional-specific horizontals (such as marketing, operations, finance) cutting across these. McKinsey treats digital as a horizontal that the company embeds into each vertical industry.

Industries served include banking; insurance; healthcare; tech, media, and telecom; public and social sector; pharmaceuticals and medical products; private equity; global energy and materials; infrastructure; advanced industries; consumer; and travel, transport, and logistics.

McKinsey Digital partners with organizations from the C-suite to the front line to transform how they work, integrate technology where it matters most, and help embed and sustain change. McKinsey transforms businesses with digital and analytics; modernizes core technology; and builds new digital businesses from scratch for and with clients.

McKinsey estimates that more than 50% of its client work is digital and analytics related. McKinsey has over 5,500 technical experts across the globe (including more than 2,000 integrative consultants who

bring a combination of business + technology), more than 2,000 specialist experts (including designers, developers, and technologists), and more than 1,500 analytics experts.

McKinsey has a portfolio of key intellectual property assets to help its clients build their digital strategies and deliver sustained impact, including:

- StrategyX is a secure cloud-based solution that gives rapid insight into portfolio performance and value drivers that may be impacted by digital technologies and generates visualizations to rapidly identify new opportunities.
- Koru is an innovation de-risking platform that accelerates commercial development of new business concepts.
- CustomerOne is a comprehensive toolkit to accelerate personalization using advanced analytics and agile ways of working.
- Digital 20/20 provides an integrated suite of diagnostic assessments across digital, analytics, technology, and agile to give a holistic view of a company's "value at stake" with recommendations to capture value. It has been used by 1,000+ companies and provides benchmarks across 18 sectors.
- Leap Quotient (LQ) is a tool that assesses the capabilities of a new business and compares them with those of peers in that sector.
- OptimusAI is a toolkit that leverages the power of AI to improve the performance of complex operations. It combines cutting-edge data science and data engineering with McKinsey's industry expertise, change management, and capability building to drive sustainable performance improvement.
- Matter is a proprietary solution that automates the end-to-end cloud journey, reducing cycle time to migrate by over 50%.
- Leap.X Banking Accelerator jump-starts the build of multiple financial services (FS) propositions with assets that can be deployed at the start of the build of a digital bank.

McKinsey hosts several client communities across industries, such as an annual digital banking summit, a CEO conference in healthcare, and an annual roundtable for high-tech industry leaders. More recently, McKinsey convened CEOs on leading through the next normal with digital; and it convened a Technology Council of experts working with next-generation technologies to debate and unlock opportunities for business in various industries.

McKinsey has more than 40 innovation labs and experience studios across six continents and estimates that up to a quarter of active clients have used these facilities. Client innovation centers include:

- **"Go & Sees":** McKinsey hosts more than 70 digital and analytics focused Go & Sees in which clients visit other McKinsey clients to learn from peers in their industry or in adjacent industries.
- **Digital design studios:** There are 24 physical locations where digital experts partner with clients to create digital products and services.
- **McKinsey Experience Studios:** 6 immersive spaces are designed to show clients new technologies and methodologies.
- **Design-to-Value labs:** 10 labs deliver experiential design thinking to product development, manufacturing, and procurement.

- **Digital Capability Centers:** 9 locations focus on digital manufacturing and supply chain, with model factories.
- **Workspaces:** There are more than 20 industry and functional-specific workspaces for clients to co-ideate around specific themes and technologies.

Key annual thought leadership from McKinsey includes *The State of AI* report, looking at the adoption and impact of artificial intelligence. McKinsey experts contribute to business publications such as *Harvard Business Review* and are frequently cited in tier 1 publications.

McKinsey has uniquely tailored strategic collaborations in place with tier 1 technology vendors, including AWS, Google, Microsoft (including Azure), and SAP.

McKinsey has made acquisitions to strengthen its digital, analytics, and technology capabilities. In January 2021, McKinsey acquired Candid Partners, a cloud consulting firm, to scale the firm's technical expertise in cloud transformation. McKinsey also acquired Hypothesis, a digital product development and transformation consultancy, and Orpheus, a provider of spend AI-powered analytics software and services.

McKinsey's open innovation industry networks include a global network of 1,000+ health tech companies that jointly foster innovation on advancing digital capabilities to understand physiology and combat disease.

In the social and environmental space, McKinsey established its COVID Response Center that helps organizations and communities safeguard lives and livelihoods. In addition, McKinsey engages smaller and black-owned businesses as part of the McKinsey Institute for Black Economic Mobility and leverages advanced analytics and cloud-based tools to drive sustainability transformations.

## Strengths

On average, the three areas where McKinsey reference clients commended the firm most highly were for cultural transformation, value for fees paid, and continuously challenging the client. Comments from McKinsey clients included:

- "McKinsey have done a great job of educating our leadership to understand agility in its true sense, and they've done a great job taking our people along with them, both in technology and in the business."
- "Without what McKinsey delivered, we wouldn't be able to build what we did in this short time frame – the value was incredible. They don't just fly in some junior people, do a nice presentation, and then fly out."
- "They are extremely good at challenging us – that's just their DNA. McKinsey have absolutely challenged us to change our culture."

## Challenges

McKinsey has the opportunity to improve its perception among clients in digital innovation/creativity and client empowerment.

## Consider McKinsey When

McKinsey is a good choice for organizations looking for a partner comfortable working across all parts of the client's organization. As one client said: "Three things I value most about McKinsey are the

sheer intellect of their people, the handholding they do to help drive transformation, and the way they connect all the elements of the business and look at the whole ecosystem."

## Publicis Sapient

According to IDC analysis and buyer perception, Publicis Sapient is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

Publicis Sapient is the digital business transformation arm of Publicis Groupe. It has more than 20,000 employees across 53 offices globally.

Publicis Sapient goes to market primarily by industry, organized across nine groups: consumer products, energy and commodities, financial services, health, public sector, retail, telecommunications, media and technology, transportation and mobility, and travel and hospitality.

Working across these verticals are six global service lines: Strategy and Consulting, Customer Experience and Design, Technology and Engineering, Enterprise Platforms, Data and Artificial Intelligence, and Innovation and Digital Product Management.

Publicis Sapient hosts a number of client communities, including Digital Executive Forums (cross-industry and for FS), a private network of senior executives meeting quarterly, and the CXO Roundtable, a private network of customer experience leaders from banks and asset managers. In retail, the company has the Inner Circle, composed of 20+ senior retail leaders. In transportation and mobility, the company holds Innovation Tours in which it introduces clients to industry peers that have completed innovative projects.

Publicis Sapient has a number of key intellectual property assets to help its clients build their digital strategies, including:

- Synapse, a proprietary platform that helps with rapid data lineage assessments and planning
- Marcel, the parent group's proprietary AI-powered personal assistant for practitioners
- Digital Transformation Index (DTI), a platform that helps clients develop a data-driven vision and road map for digital excellence
- KaaS, a tool that helps clients generate more and better insights from data
- Rapid Commerce, a cloud-native solution based on microservices that gives companies an agile way to implement commerce in their environments
- CDP Quickstart, a technology that helps clients accelerate their ability to modernize the way they manage their customer data with cloud-native capabilities
- CORE ID, Publicis' identity graph with over 200 million people and capturing 200 billion events a day to help clients create audiences of customers and prospects to drive growth
- Mobile Experience Barometer, a tool that compares and contrasts the mobile offerings of the United Kingdom's energy suppliers

Publicis Sapient has a global innovation center network that includes:

- **Dedicated Incubators (P-Labs):** Spaces where start-ups and clients' new ventures work with Publicis Sapient's ecosystem of partners
- **Emerging Experience Labs:** Centers where clients are immersed in cutting-edge technologies such as IoT, robotics, machine learning, natural language processing, and machine vision



- **Mobile Centers of Excellence:** Centers of excellence where Publicis Sapient's innovation practitioners work with mobile hardware and software
- **In-venue digital design labs:** Places where Publicis Sapient innovation practitioners blend digital solutions with physical solutions (such as kiosks) to create integrated solutions
- **Kepler Labs:** Secure physical spaces for Publicis Sapient staff to use emerging technologies to solve business problems in an exploratory way
- **X-lab:** A lab in India focused on developing concepts that demonstrate how technology can drive next-generation retail innovation and omni-channel customer experiences
- **Virtual labs:** Centers that run virtually using tools such as MURAL and Zoom, which became especially important during the COVID-19 crisis

Key annual thought leadership from Publicis Sapient includes the recently initiated *Digital Life Index (DLI)* report. Employees have recently written articles in publications such as *Forbes India*, and in early 2021, Publicis Sapient CEO Nigel Vaz published a book titled *Digital Business Transformation*.

Key clients in the Strategy and Consulting space include Carrefour, Nissan, Bang & Olufsen, Nationwide Building Society, Pilot Company, Walmart, Bangkok Bank, and British Gas, to name a few.

Publicis Sapient has alliances with tier 1 technology vendors including Adobe, AWS, Google, Microsoft (including Azure), Oracle, SAP, and Salesforce.

Publicis Sapient makes occasional acquisitions to strengthen its digital strategy capabilities. In early 2020, Publicis acquired Australia-based business consultancy Third Horizon. Around the same time in Europe, it launched a joint venture, Publicis Sapient AI Labs (PS AI Labs), in collaboration with Elder Research and Tquila.

Publicis Sapient's open innovation networks include a network of venture capital firms and start-ups and partnerships with faculty from universities such as the Singularity University, the University of Oxford, MIT, and Stanford.

In the social and environmental space, Publicis Sapient's offerings and work include the A.L.I.C.E. platform, which allows the company to advise clients on the environmental impact of technology and business transformation projects. In the United States, Publicis Sapient has been working with the Bureau of Health Workforce (BHW) at the Health Resources and Services Administration (HRSA) to help address the national challenge of providing access to healthcare in underserved areas.

Publicis Sapient says that its mission in digital strategy consulting is "helping established organizations become digitally enabled to help them better serve their customers and thrive in the future."

## Strengths

On average, the three areas where Publicis Sapient reference clients commended the firm most highly were for action orientation, ability to drive measurable value, and digital innovation/creativity.

Comments from Publicis Sapient clients included:

- "Action orientation was one of the reasons we selected Publicis Sapient, and it turned out to be true in real life."
- "The projects that they have done have created exceptional impact. They have been exceptional at creating platforms that integrate with a variety of our systems."

- "The quality of Publicis Sapiient people is excellent; they are real experts with strong ideas. They have a strong ability and a desire to adapt."

## Challenges

Publicis Sapiient has the opportunity to improve its perception among clients in terms of client insight and to make further progress in value for fees paid.

## Consider Publicis Sapiient When

Publicis Sapiient is a good fit for organizations looking for an action and value-oriented partner with strong technology consulting and implementation capabilities. As one Publicis Sapiient client said: "Sapiient have several differentiations – first, the quality of their people; second, their cutting-edge ideas and their technology innovation. In terms of technology, they're really, really strong and have a collaborative mindset and have a lot of drive."

## PwC

According to IDC analysis and buyer perception, PwC is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

PwC is a network of professional services firms with offices in 157 countries and more than 276,000 employees. PwC has approximately 6,000 people focused on delivering digital strategy services globally. In addition, the firm has more than 3,000 experience specialists, over 3,500 emerging technology specialists, and more than 25,000 global analytics professionals, data scientists, and application developers working with its innovation center network. Further, nearly all of the firm's employees globally have been trained in PwC's BXT (Business, Experience, Technology) framework.

PwC has 11 industry sectors, including financial services, industrial manufacturing, and transport and logistics. Within each industry sector, the firm has strategy practitioners who address how technology, data, and analytics can be leveraged as part of a BXT team. These technology, data, and analytics practitioners team with other digital experts in organization, culture, deals, and other go-to-market teams, as well as PwC's Experience Center, to put together a BXT team, staffed jointly with client talent.

PwC uses a global network of nearly 40 Experience Centers and accompanying Emerging Tech Labs, Innovation Labs, and Impact Centers. These are dedicated physical locations at the firm's facilities:

- PwC Experience Centers bring together experienced strategists, designers, and technologists.
- PwC Emerging Tech Labs are where PwC helps clients understand how to leverage emerging technologies by developing functional prototypes within a business context.
- PwC Innovation Labs feature dedicated innovation specialists with team members who are embedded in industry verticals.
- PwC Impact Centers feature practitioners working with clients to help them build their innovation capabilities.

PwC has a number of key intellectual property assets to help its clients build their digital strategies, including:

- PwC Products, a suite of 40 assets that tackle the very real challenges clients face, unlocking new opportunities for growth in the future
- Strategy Profiler, a survey to help clients identify potential areas for improvement based on their current situation

- Sustainability Profiler, a survey that gives clients feedback on their sustainability efforts and actionable recommendations to capitalize on sustainable opportunities
- Aperture, a data visualization platform that helps clients' leaders have fact-based discussions about strategy through an annual "strategy scan"
- Capabilities Assessment Tool, which helps clients identify, build, and monitor critical capabilities
- Organization Effectiveness Simulator, a tool that measures clients' current effectiveness and suggests actions and insights
- Workforce Strategy Diagnostic, a tool that helps clients assess the maturity of their workforce strategy and compare it with others in their region and industry
- Customer Insights Platform (CIP), an accelerator to help clients build new activation capabilities and develop KPIs
- Behavior Predictor, a tool that uses machine learning to provide clients with insights into the future behavior of their clients' customers (or citizens or patients), based on psychographic, behavioral, environmental, demographic, and commerce data

PwC hosts a number of client communities, such as a monthly Silicon Valley CIO Community Breakfast meeting, a monthly mobile telecom fraud roundtable, and a banking CHRO virtual forum.

PwC uses a global network of nearly 40 Experience Centers and accompanying Emerging Tech Labs, Innovation Labs, and Impact Centers. These are dedicated physical locations at the firm's facilities, but the experts who work in them are also able to work and deliver virtually. These centers are composed of different elements, including:

- **Agile Enclosed Spaces:** Digitally enabled multipurpose and modular rooms that can be used for working sessions, as team rooms as well as partner offices
- **Main Quads:** A welcoming, energizing, and connecting experience exuding PwC values and model digital transformation and celebrating talent as well as connecting PwC to one another and to the community
- **Team Hubs:** Team neighborhoods that enable and empower teams to do their best work by providing an ecosystem of space types, technology access, self-organization, and team connectivity and identity
- **Oasis:** Amenities, places, and services that allow team members to sustain a high level of performance and support their physical, mental, and spiritual well-being, highlighting the diversity of PwC partners and staff
- **Tech and Connect:** Physical and digital methods of connecting with individuals and teams within the office and region (e.g., people-finding apps, interconnecting stairs, open sightlines between teams)
- **Continuous Learning Spaces:** Access to places, connections, and information that accelerates team members' learning and career growth (e.g., creative learning environments, digital lateral awareness, connection to customer issues)

Key annual thought leadership from PwC includes the *Global Digital IQ* report. PwC also published its own business and management magazine, *strategy+business*.

PwC is a partner of tier 1 technology vendors including Adobe, AWS, GCP, Microsoft/Azure, SAP, Oracle, and Salesforce.

PwC makes occasional acquisitions of services and software companies to strengthen its digital strategy capabilities. In late 2020, PwC acquired EagleDream Technologies, an AWS Premier Consulting Partner.

In the social and environmental space, PwC's work includes services to help clients create environmental, social, and governance strategies and processes; diversity and inclusion (D&I) consulting; and support for The Trevor Project, a suicide prevention and crisis intervention organization for LGBTQ+ youth. PwC's Saratoga offering has a specific diversity benchmarking offering, helping organizations meet their goals for promoting diversity of talent.

PwC says that its mission in digital strategy consulting is: "To deliver outcomes and unlock value by solving complex problems, delivering human-centric and experience-driven solutions enabled by today's most advanced technologies."

### **Strengths**

On average, the three areas where PwC reference clients commended the firm most highly were for client insight, value delivered for fee paid, and action orientation. Comments from PwC clients included:

- "PwC really involved all levels of our organization and took the time to really understand the reasons for our decisions before they offered us guidance. It was refreshing that they didn't just come in with a prebuilt solution that did or didn't fit."
- "Of all the firms I know, PwC stands out in terms of the delivery of real tangible value."
- "With PwC, it's very actionable – they give me the playbook. We focus on business value and ROI, on what we can do in the first year, and then on what we can do three years down the road."

### **Challenges**

PwC has the opportunity to improve its perception among clients in cultural transformation and in continuously challenging the client.

### **Consider PwC When**

PwC is a good fit for organizations looking for a consulting partner with strong client alignment and a focus on actionable advice. As one PwC client said: "PwC deliver measurable results, and they make me feel like I'm their only client, that my needs are as important to them as they are to me. They own the risk every bit as much as I do. You don't want to be in the foxhole with anyone else."

### **TCS**

According to IDC analysis and buyer perception, TCS is positioned in the Major Players category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

Founded in 1968, Tata Consultancy Services (TCS) is the oldest and largest of the global services companies headquartered in India. The company has more than 488,000 employees and operates globally.

TCS goes to market by vertical, with 14 core global markets including BFSI; retail and consumer business; communications, media, and technology; manufacturing; and life Sciences and healthcare. Around 303,000 of TCS' employees are aligned with a vertical industry.

Key TCS service lines include Consulting and Services Integration, TCS Interactive, Analytics and Insights, Enterprise Applications, Cognitive Business Operations, and Cloud. TCS has an estimated 80,000 employees providing consulting and IT services in the digital growth and transformation area.

Within TCS' Digital Strategy and Transformation portfolio of services, key offerings are Cloud Strategy and Transformation, CX Transformation, Supply Chain as a Service, NextGen Enterprise Transformation, Enterprise Agility, Finance and Shared Services Transformation, Risk and Cyber Resilience, and M&A.

TCS has several key intellectual property assets to help its clients build their digital strategies, including:

- Velocity, a cloud-enabled digital transformation accelerator that serves as a reference for enterprise value drivers, digital capabilities, and process modeling to reimagine operating models
- Strategic Insights, which develops data-driven digital value hypotheses to establish performance baselines and align on strategic transformational opportunities
- TCS Digital Enterprise Maturity Model (DEMM), a benchmark for measuring the digital maturity of an organization on a scale of five digital maturity levels
- Transformation Delivery Method (TDM), a delivery framework with seven tracks covering the life cycle of a project, including a Value Track and a Sustain phase that drives benefits realization
- TCS DATOM, a tool to help clients evaluate their enterprise data and analytics maturity by assessing how their data is governed and managed and to generate insights from this
- TCS Optumera, an AI-powered retail optimization suite that helps clients make optimized merchandising and supply chain decisions
- TCS Advanced Drug Development (ADD), an open technology platform across the clinical R&D value chain that supports drug development and agile clinical trials

TCS has a global network of innovation facilities, with about 3,000 employees dedicated to its innovation centers. This network includes:

- 30+ Innovation Labs
- Innovation Showcase Labs, where clients can see live demonstrations of emerging technologies
- The Executive Briefing Center (EBC), a flagship facility in Mumbai, India, for showcasing TCS' capabilities, including key industry solutions
- A global network of Customer Executive Centers, where clients can hold innovation workshops that include rapid prototyping of ideas and creation of innovation road maps
- A global network of "Pace Port" innovation and collaboration centers that are modular in nature and have five key components:
  - Innovation Showcase, a presentation and engagement facility that helps clients visualize the "digital art of the possible"
  - TCS COIN Accelerator, a collaborative space for TCS associates, customer teams, and promising start-ups to cocreate solutions
  - Academic Research Labs, spaces where TCS and academic researchers collaborate on research

- Agile Workplaces, a working environment to run business solution concepts
- Think Space, a custom studio for rapid ideation of new ideas

TCS hosts several client communities and events such as industry-specific forums throughout the year with industry-specific clients. TCS also hosts annual client Innovation Forum regionally where external speakers share experiences and advice.

Key thought leadership from TCS includes the *Winning in a Business 4.0 World* report and its semiannual *Perspectives* journal. Former TCS CEO and current Tata Sons chairman Natarajan Chandrasekaran recently cowrote a book, *Bridgital Nation: Solving Technology's People Problem*, on how technology can help drive India's future development.

Key TCS clients in the Strategy and Consulting space include Novolex, Bayer, DuPont, General Motors, Petco, Phoenix Group, Star Alliance, Damen, RBC Capital Markets, Merck, and Woolworths.

TCS has alliances with tier 1 technology vendors including Adobe, AWS, Google, Microsoft/Azure, Salesforce, and SAP.

TCS' Co-Innovation Network (COIN) includes 2,500+ start-ups, 150+ partners, 300+ venture capitalists, and 50+ academic alliances (e.g., Stanford, Cornell Tech, Carnegie Mellon).

In the social and environmental space, TCS' work includes services around sustainability, wellness, resilience and adaptability, and accessible design for people with disabilities. TCS recently partnered with University of Auckland for building a digital sustainability index. In the early stages of the COVID-19 pandemic, a team of scientists in TCS' Innovation Lab in Hyderabad, India, identified 31 molecular compounds using AI techniques.

TCS says that its mission in digital strategy consulting is "Building On Belief." TCS is confident that this journey-focused approach will propel its clients – and their stakeholders – into a greater future. This builds on its long-standing reputation for delivery excellence and capitalizes on its purpose centricity and role as a growth and transformation partner for its clients.

## Strengths

On average, the three areas where TCS reference clients commended the firm most highly were for client insight, ability to drive measurable value, and value delivered for fees paid. Comments from TCS clients included:

- "TCS understand our people, and they get into the DNA of our business, so their solutions are absolutely on point. They understand our culture and politics."
- "TCS are very clear at defining deliverables. They do a very good job of defining the importance of what we're measuring and how we define success, and they really do a good job to make sure we keep grounded to what we've defined as success factors."
- "The return on investment has been high – I've been pleased with what we've been paying versus what we've generated in overall savings. I would say it's exceeded my expectations."

## Challenges

TCS has the opportunity to improve its perception among clients in client empowerment and continuously challenging clients.

## Consider TCS When

TCS is a good choice for organizations looking for a pragmatic, action-oriented consulting partner with broad and deep technology capabilities. As one TCS client said: "TCS are good at applying knowledge pragmatically. I have dealt with all the consulting companies in the world, but a lot of them are fluff – while TCS are actionable; they do things."

## APPENDIX

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### 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.

Note: IDC does not publish market shares for digital strategy consulting services. IDC has therefore estimated these market shares specifically for the purposes of this assessment.

### 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

Digital strategy consulting services are project-oriented services that help clients define how they will use "digital" (3rd Platform) technologies and services to achieve their strategic objectives.

Digital strategy consulting services show the client how to derive business value from deploying 3rd Platform technologies and services, typically including cloud services, big data and analytics (BDA), mobility, cognitive/artificial intelligence (AI) technologies, social business, next-generation security, the

Internet of Things (IoT), and other next-generation technologies such as blockchain and quantum computing.

Digital strategy consulting services are chiefly composed of business consulting activities, including strategy consulting, supplemented with technology consulting activity.

Digital strategy consulting services *do not include the actual implementation* of digital technologies and the actual transformation of business processes and organizational structures that invariably accompany the deployment of new digital technologies and services.

However, digital strategy consulting services may, on occasion, contain a small element of software development services and product engineering services to produce proofs of concept, prototypes, or minimum viable products (MVPs).

## **Strategies and Capabilities Criteria**

The importance of a firm's characteristics to project success and relevance of the particular issue combined with IDC's opinion about the impact those elements have on selection of firms implies a unique weighting of these elements when evaluating a firm's overall strategy and capability to address market opportunity and realizing market success (see Tables 1 and 2).



**TABLE 1**

**Key Strategy Measures for Success: Worldwide Digital Strategy Consulting Services**

Strategies Criteria	Definition	Weight (%)
Offering road map	<b>New offerings and focus areas:</b> There is evidence that focus areas and consulting offerings in the next two years will incorporate a balance of new "burning platform" technologies and business strategy issues (e.g., CX, COVID-19) with longer-term issues and more mature technologies.	10.0
	<b>New supporting assets and capabilities:</b> Constant development of new assets/capabilities helps clients develop their digital strategy better and faster ( <i>not</i> technology implementation assets).	10.0
Delivery model	<b>Action orientation:</b> Strategy is actionable in the short term and is designed specifically to meet the client's strategic business goals.	11.0
	<b>Client-facing "challenge culture":</b> This involves constantly challenging the client to accept new approaches or solutions.	11.0
	<b>Pricing models:</b> A range of pricing/payment models take into account clients' need for both flexibility and certainty, and their appetite for risk.	9.0
Growth	<b>Geographic and industry growth strategy:</b> Continual development of growth strategies around geographies and vertical industries strengthens the vendor's capabilities and offerings portfolio.	10.0
	<b>Partner-enabled growth:</b> DSC capability enhancement via new or expanded external partnership ensures the vendor strengthens its capabilities.	7.0
	<b>High-quality digital strategy professionals:</b> Staff are routinely of the highest caliber — at all levels — to meet client expectations.	11.0
	<b>Client willingness to recommend:</b> Successful consulting firms maintain a strong reference pool of satisfied clients willing to recommend their digital strategy work to any other organization.	10.0
Differentiation	<b>Commitment and empathy:</b> Commitment to a client's best interests is paramount and overrides a consultancy's immediate interests.	7.0
	<b>Cultural differentiation:</b> There is a strong and differentiated culture within the vendor, permeating all parts of the firm.	4.0
Total		100.0

Source: IDC, 2021

**TABLE 2**

**Key Capability Measures for Success: Worldwide Digital Strategy Consulting Services**

Capabilities Criteria	Definition	Weight (%)
Offering road map	<b>Business model transformation:</b> Consulting services drive the transformation of a client's business model, enabled by digital technologies, and draw on strategy consulting, supplemented with organizational consulting and IT consulting.	9.0
	<b>Operating model transformation:</b> Consulting services drive the transformation of a client's operating model, enabled by digital technologies. For the client, this results in significant improvements in a client's day-to-day operational efficiency and agility (e.g., by rationalization of its applications, business processes, or IT infrastructure).	9.0
	<b>Industry-specific strategy capabilities:</b> Deep industry insight and experience help clients create successful digital strategies. This can include better understanding of an industry and/or learning useful lessons from other industries to apply to that industry.	9.0
Innovation	<b>Digital innovation and creativity:</b> An innovative and creative approach to using technology supports clients' strategic business objectives.	10.0
	<b>Cultural transformation:</b> This involves the ability to help clients transform their organizational culture to make their organization more "digitally native" (i.e., to continually embrace new technologies and new ways of working, but in a sustainable way that fits with the organization's core identity and purpose).	8.0
	<b>Client-facing applied innovation network:</b> A network of dedicated ideation and innovation facilities (physical and/or virtual) help clients create new strategies, discover new business opportunities, and plan new offerings enabled by digital technologies.	7.0
R&D pace and productivity	<b>Digital alliances and partnerships:</b> Systematic partnership with dynamic networks of allies (technology and services providers, start-ups, academia, etc.) ensures that clients' digital strategies contain innovative and leading-edge elements.	6.0
	<b>Digital thought leadership:</b> Structured production of innovative insights (points of view, use cases, etc.) and assets supports digital strategy engagements.	6.0
Customer satisfaction	<b>Client-specific insight:</b> The vendor has a deep understanding of an individual client's culture, business objectives, and technology to maximize the potential of the client's digital strategies.	10.0
	<b>Client strategy success:</b> The vendor has a demonstrated ability to help the client's digital strategy to successfully create business value.	11.0
	<b>Value delivered for fees paid:</b> The vendor has a demonstrated ability to deliver the best high value in the context of the fees paid.	8.0
	<b>Client empowerment:</b> The goal is to leave the client capable of independent strategy creation and execution after the engagement formally ends.	7.0
Total		100.0

Source: IDC, 2021

## LEARN MORE

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### Related Research

- *IDC Market Glance: Digital Strategy Consulting, 3Q20* (IDC #US46364020, August 2020)
- *Worldwide and U.S. Digital Strategy Consulting Services Forecast, 2020-2024* (IDC #US46363820, July 2020)
- *IDC MarketScape: Worldwide Digital Strategy and Agency Services 2017 Vendor Assessment* (IDC #US41462717, August 2017)
- *IDC MarketScape: Worldwide Digital Strategy Consulting Services for Digital Operations 2016 Vendor Assessment* (IDC #US40634616, January 2017)
- *IDC MarketScape: Worldwide Digital Strategy Consulting Services for Digital Product Innovation 2016 Vendor Assessment* (IDC #US40634716, January 2017)

### Synopsis

This IDC study uses the IDC MarketScape methodology to provide an assessment of 13 of the major providers of digital strategy consulting services worldwide. This evaluation is based on a comprehensive framework and a set of parameters that assesses providers relative to one another and measures vendors according to those factors expected to be most conducive to success in a given market during both the short term and the long term.

"Businesses and public bodies have never in living memory experienced such a disruptive and fast-moving environment on multiple levels – including the economic, social, demographic, technological, and political levels," said Douglas Hayward, research director, Digital Strategy and Agency Services at IDC. "Organizations face a range of challenges and opportunities whose effects for many of them will be transformative. Technology will play a key role in how they sense, understand, and then address the challenges and opportunities that will define their immediate and possibly long-term future."

"Clients are therefore looking for consulting partners that anticipate how the world around them is changing, that can help them craft a vision for the future, and that grasp the centrality of technology in understanding and meeting new consumer and business needs," added Hayward. "And just as importantly, at a time when the world is seemingly being turned upside down, they want partners that challenge them and open their eyes to new possibilities. Great digital strategy consultancies do all this by operating not just at the business and technology levels but at the human level, too."

## 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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