

## IDC MarketScape

# IDC MarketScape: Worldwide Business Consulting Services 2020 Vendor Assessment

Gard Little

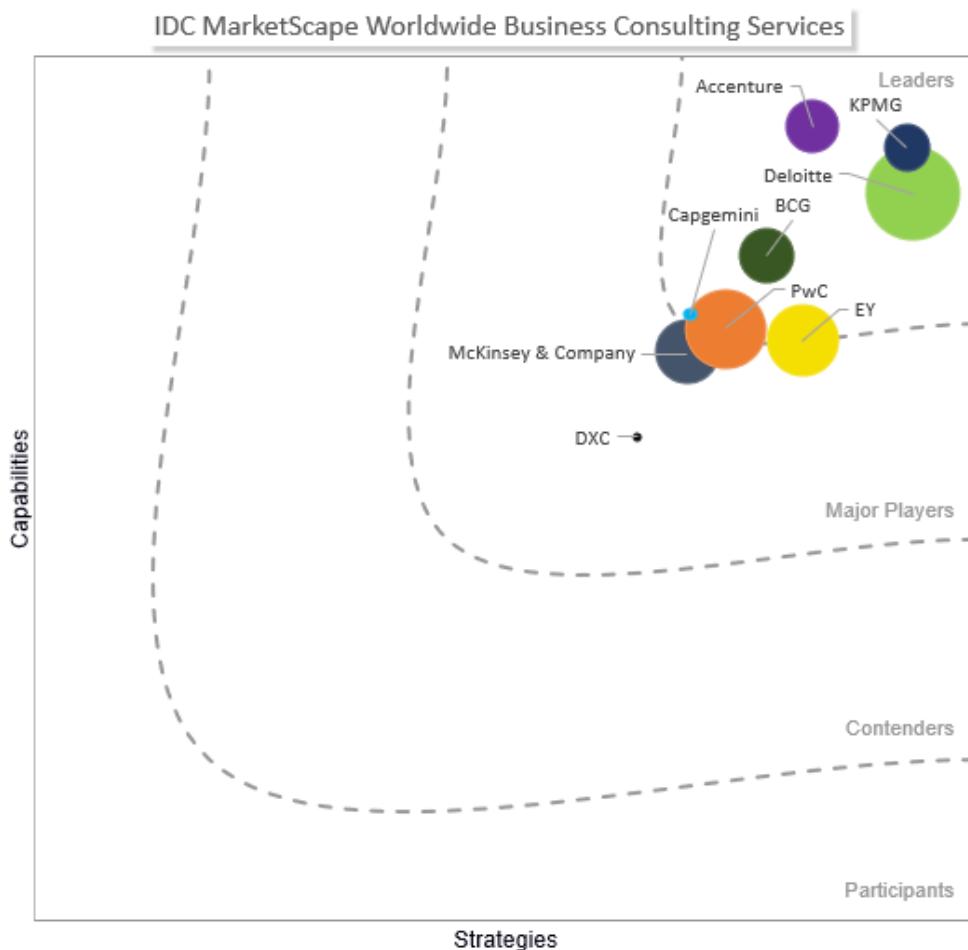
Bjoern Stengel

THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE

### IDC MARKETSCAPE FIGURE

#### FIGURE 1

#### IDC MarketScape Worldwide Business Consulting Services Vendor Assessment



Source: IDC, 2020

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

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Business Consulting Services 2020 Vendor Assessment (Doc # US45629620). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

### IDC OPINION

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This study represents the vendor assessment model called IDC MarketScape. It is a quantitative and qualitative assessment of the characteristics that explain a vendor's current and future success in the marketplace. The evaluation assesses the capabilities and business strategies of many prominent business consulting firms. It is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing business consulting services during both the short term and the long term. A significant component of this evaluation is the inclusion of business consulting buyers' perception of both the key characteristics and the capabilities of these consulting providers, both directly from the vendors' clients and through a survey. Overall, these firms performed very well on this assessment. Key findings include:

- Worldwide, consulting providers are generally perceived as being able to excel at integrating their engagement teams with those of their clients, understanding the unique needs of a client's business, and offering high-quality staff. They are also considered very capable of meeting the project timeline and providing functional insights and competence.
- This evaluation discovered that generally clients are less impressed with consulting providers' ability to directly improve their commercial performance, integrate appropriate analytics into the engagements, and drive and support business change across the client organization – all essential to many significant business transformation initiatives.
- Clients globally rated their providers, in aggregate, best at helping them with the following business priorities: developing digital products and services, transforming critical processes, and adapting to change and becoming more agile.

### IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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This research includes analysis of the five largest business consulting firms based on worldwide revenues in IDC's Services Tracker, and additional firms with broad portfolios spanning the different business consulting domains identified in *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019). These criteria were used because the scope of this evaluation covers the broadest definition of business consulting. The assessment is designed to evaluate the characteristics of each firm – as opposed to its size or the breadth of its services. It is conceivable, and in fact the case, that specialty firms can compete with multidisciplinary firms on an equal footing. As such, this evaluation should not be considered a "final judgment" on the firms to consider for a particular project. An enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for an engagement.

## ADVICE FOR TECHNOLOGY BUYERS

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

- Expand into new markets and geographies
- Reduce cost
- Improve talent performance, retention, and engagement

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

## VENDOR SUMMARY PROFILE

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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 the vendor's strengths and challenges.

### Accenture

Accenture is positioned in the Leaders category in this IDC MarketScape on worldwide business consulting services for 2020, based on IDC analysis and customer feedback.

Accenture helps clients address complex, mission-critical issues and works closely with C-suite executives to help them steer and shape their innovation and transformation agendas. With 509,000 employees and locations in 51 countries, Accenture is one of the world's largest professional services companies. Its clients include more than three-quarters of the Fortune Global 500, including 91 of the top 100.

Earlier this year, Accenture announced changes to its growth model designed to unleash the full potential of the company's capabilities, increase innovation, and create greater opportunities for its people. As part of this, Accenture is simplifying its organizational structure to more easily create multidisciplinary teams to serve its clients and work with ecosystem partners to create new assets and solutions.

Accenture will now organize its capabilities in four units, referred to as Services: Strategy & Consulting, Interactive, Technology, and Operations – with digital and technology expertise pervasive in all parts of its business. The company will manage its business through three geographic-based markets – Europe, growth markets, and North America – instead of five operating groups. At the same time, Accenture will continue to go to market by industry and will expand its global industry programs.

Accenture Strategy & Consulting, with more than 41,000 skilled professionals, includes the capabilities of Accenture Strategy; the industry consulting, functional consulting, and technology advisory capabilities (formerly in its operating groups); its network of innovation hubs; its Applied Intelligence capabilities; and advisory services for Industry X.0.

Accenture's services are differentiated by:

- **Deep industry and functional expertise.** As digital disruption continues to blur traditional industry lines, cross-industry expertise has become imperative. Accenture has deep industry and functional expertise across more than 40 industries. Under the new growth model, Accenture will have more resources aligned to industry, uniting around a single agenda for each industry across all of Accenture. The company's goal is to redefine the meaning of "industry differentiation" by using its depth and breadth in each industry and systematically bring cross-industry insights and intelligent solutions to its clients and better serve clients that are at the center of industry convergence.
- **Applied intelligence, data-infused analytics and insights, and design capabilities.** Accenture's Strategy & Consulting organization is centered around strategy, functional, and industry acumen; driven by assets and intellectual property (IP) – some proprietary, while others created, acquired, developed, or leveraged through partnerships with technology companies; and underpinned by data insights and design to provide continuous innovation to clients. Through its integration of data science, design, and technology acumen at scale, Accenture helps clients capitalize on disruption and anticipate changes to enter new markets, develop new business models, and transform clients' businesses.
- **Continuous innovation and agility at scale.** Accenture has shifted to a mindset of continuous innovation in every part of its business, from its services to how it operates. Over the years, Accenture has made significant R&D investments to be at the forefront of cutting-edge, disruptive technologies. In fiscal year 2019, Accenture invested US\$1.8 billion in R&D and training and an additional US\$1.2 billion across 33 acquisitions to acquire critical skills and capabilities in strategic, high-growth areas of the market. Accenture has a track record of integrating acquisitions into its business and leverages them to drive organic growth and enhance its differentiation. In addition, Accenture has strong IP positions in areas such as artificial intelligence (AI), cybersecurity, blockchain, quantum, and extended reality, with approximately 7,400 patents and pending patent applications in 44 countries. Collaboration and innovation are fundamental to how Accenture works with clients. The Accenture Innovation Architecture integrates the company's end-to-end capabilities – including those from Accenture Research, Accenture Ventures, Accenture Labs, Accenture Studios, and Accenture Innovation and Delivery Centers – to help clients quickly identify, develop, scale, and deliver disruptive innovations.
- **Global scale and ecosystem relationships.** Accenture serves clients in more than 120 countries and has an extensive network of digital studios, liquid studios, innovation centers, and delivery centers across the globe. In addition, Accenture has built a global ecosystem of more than 200 alliance partners that spans numerous industries and includes start-ups, universities, research institutions, technology companies, venture capital firms, up-and-coming disruptors, and industry associations. Accenture is a partner of many key technology players – including SAP, Microsoft, Oracle, Salesforce, and Workday – and a global player in cloud and AI on the Amazon Web Services (AWS), Microsoft Azure, and Google Cloud platforms. Accenture's Avanade joint venture, co-owned with Microsoft, delivers services around Microsoft technology. Accenture leverages these relationships, together with its digital and industry expertise, to help clients transform their enterprises.
- **"The New" that is now core.** Accenture's rotation to what the company calls "the New" – digital, cloud, and security services – over the past six years has proven the company's ability to identify and scale new opportunities in strategic, high-growth areas of the market and deliver more industry-specific and cross-industry knowledge for the business and its clients. "The New" is now core to Accenture's business and accounts for about 65% of the firm's total revenue.

- **Ability to deliver value for clients.** Accenture's commitment to deliver transformational value, from Strategy & Consulting to Operations, helps the company serve its clients in an age when traditional business consulting is experiencing its own level of disruption. By combining the expertise of its practices within a single organization, Accenture serves clients through multidisciplinary teams comprising professionals not only from its Strategy & Consulting service (including strategy practitioners, industry and functional consultants, tech advisory consultants, and Applied Intelligence and Industry X.0 practitioners) but from its Interactive, Technology, and Operations services as well. Accenture's continued emphasis on shared objectives fosters regional collaboration to support global priorities and enables the firm to move seamlessly from global to local and from local to global.

## **Strengths**

Worldwide, Accenture is seen to excel at providing functional insights and competence. Accenture's additional strengths are understanding clients' unique business needs and meeting the project timeline.

## **Challenges**

Accenture can improve its perception among clients related to its ability to help clients expand into new markets and geographies. On projects, Accenture should emphasize how it can help clients adapt to change and become more agile and transfer knowledge and skills to the various stakeholders.

## **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.

### **IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of a review board of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, the vendors' customer references, publicly available

information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

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

- **Big 4:** IDC recognizes the well-known Big 4 firms as the four largest international accountancy and professional services firms – Deloitte, EY, KPMG, and PwC.
- **Multidisciplinary:** IDC describes multidisciplinary firms as large, diversified consulting organizations that offer a range of business consulting services to clients across a myriad of sectors. To distinguish these from other specialty firms, consulting services must address more than two business functional areas, in addition to providing strategy and operational implementations.
- **Technology led:** These are also large, multifaceted firms and are known for deep expertise in both technology and business consulting. IDC identifies these firms as those that expanded from information technology-centric businesses into more broad business consulting or vice versa.
- **Specialty:** Specialty firms have focused areas of consulting expertise in specific industries, functional areas, or technologies. Management and strategic consulting specialists that offer primarily strategy consulting and business intelligence (BI) models to specific sectors or industries including government fit into this category of firms.

## LEARN MORE

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### Related Research

- *Worldwide and U.S. Business Consulting Services Market Shares, 2018: Marrying Strategy and Technology-Related Services Offerings Continues to Drive Growth* (IDC #US43248719, November 2019)
- *Market Analysis Perspective: Worldwide and U.S. Business Consulting Services, 2019* (IDC #US43248519, September 2019)
- *Global Client Value Survey, 2019: How Consulting Services Engagements Are Changing* (IDC #US43248319, June 2019)
- *Worldwide and U.S. Business Consulting Services Forecast, 2019-2023* (IDC #US43248419, May 2019)

### Synopsis

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

"On a global level, business consulting providers are generally perceived as being able to integrate their engagement teams with those of their clients, understand the unique needs of a client's business, and offer high-quality staff. They are also considered very capable of meeting the project timeline and providing functional insights and competence," said Bjoern Stengel, senior research analyst, Business Consulting Services at IDC. "This evaluation discovered that generally clients are less impressed with consulting providers' ability to directly improve their commercial performance and integrate appropriate analytics as well as overall technologies into the engagements – all essential to many significant business transformation initiatives."

## 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](http://idc-community.com)  
[www.idc.com](http://www.idc.com)

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