

# IDC MarketScape: Worldwide AI Services for National Civilian Government 2025 Vendor Assessment

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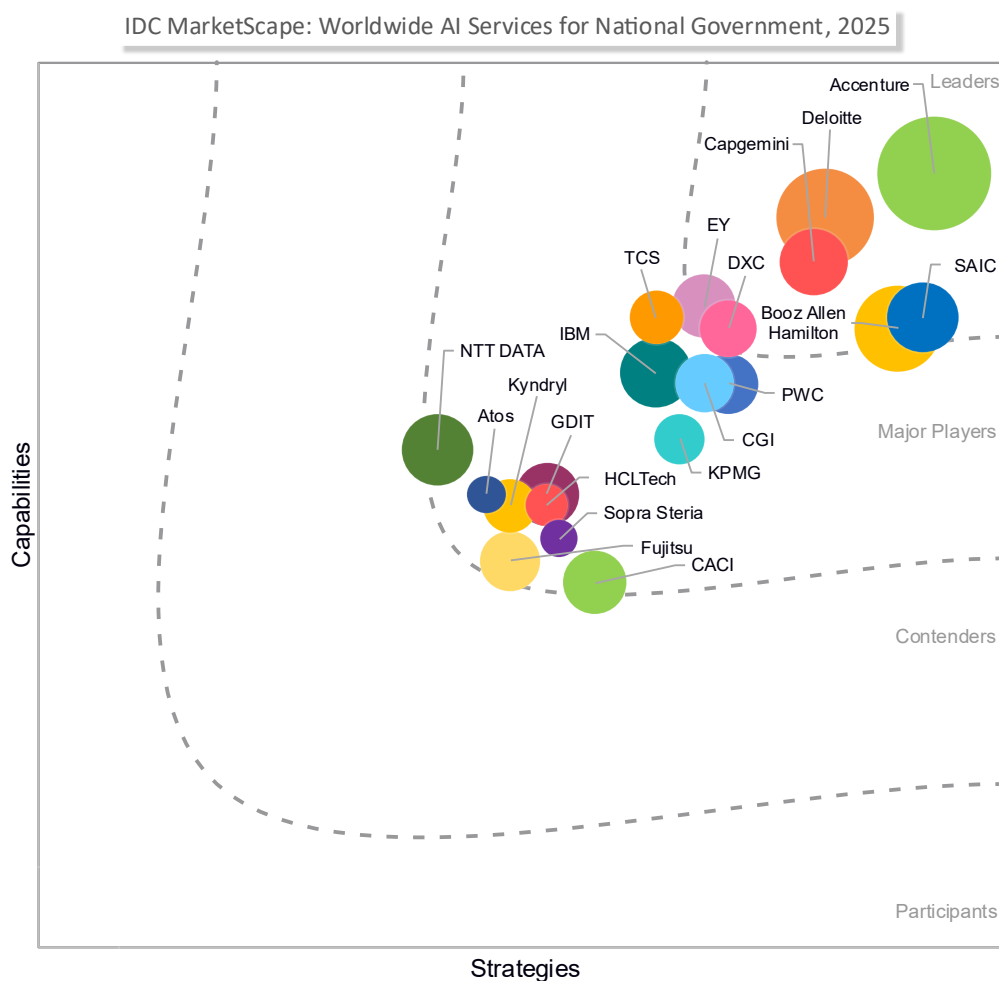
Massimiliano Claps

**THIS EXCERPT FEATURES ACCENTURE AS A LEADER**

## IDC MARKETScape FIGURE

**FIGURE 1**

### IDC MarketScape Worldwide AI Services for National Civilian Government 2025 Vendor Assessment



Source: IDC, 2025

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

## ABOUT THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide AI Services for National Civilian Government 2025 Vendor Assessment (Doc # US53125325).

## IDC OPINION

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Global and regional services firms are scaling up their investments in AI expertise and solutions through five types of strategic initiatives:

1. Developing AI frameworks that help governments accelerate the ideation, design, data readiness, and implementation of AI innovations to drive mission impact
2. Investing in partnership ecosystems to ensure AI workloads can be deployed across public, private, hybrid, and sovereign cloud environments and can leverage multiple AI models
3. Leveraging AI and AI agents to embed automation in IT operations, the software development life cycle (SDLC), and cybersecurity service offerings to accelerate legacy modernization, enhance efficiency, and strengthen the observability of operational systems
4. Committing to AI compliance, security, and responsible use by adopting international standards and contributing to shaping them
5. Establishing centers of excellence, innovation hubs, and other co-creation vehicles to enable governments to experiment in protected sandbox environments and accelerate ROI

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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- Worldwide AI services revenue of at least \$100 million in CY 2024
- Offerings across the AI business and IT services life cycle (e.g., project-based, managed, support, and training). The vendor must generate at least 15% of its total revenue from across business and IT services from the latter.
- AI services offerings and solutions addressing national civilian government agencies, with at least three existing national civilian government customers currently collaborating with the vendor to design, develop, pilot, and implement AI solutions
- The vendor must be technology-agnostic, meaning it cannot be the IT services department of a hardware or software vendor offering products used across the AI solution stack

- Go-to-market partnerships with a range of AI software and hardware providers, including but not limited to global hyperscalers (e.g., AWS, GCP, and Microsoft) and AI specialists (e.g., Anthropic, OpenAI, and Mistral)

## ADVICE FOR TECHNOLOGY BUYERS

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1. **Mission expertise and assets:** Evaluate the depth and breadth of data blueprints, pre-trained algorithms and AI agents, implemented AI use cases versus theoretical lists/catalogues of use cases, and the mission-specific experts vendors have available.
2. **Agility and openness of AI models and deployment models:** Consider that some IT services companies prioritize investments to build depth of expertise around certain AI models, platform offerings, or deployment models (e.g., some have started to focus on private AI as a preferred option to satisfy sovereignty requirements), while others invest in a breadth of options. In the former case, governments will be able to scale expertise and knowledge transfer; in the latter, they will reduce the risk of lock-in but require more mature solution architecture and vendor contract governance competencies and capacity.
3. **AI for software development life cycle and ITOps:** Evaluate the agility of AI frameworks that IT services firms make available in terms of the breadth and depth of models that can be leveraged for software documentation, testing and QA, engineering, code development, code refactoring, and delivery and IT operations (e.g., automated provisioning, observability, threat detection, and incident response). Consider whether these frameworks are applicable across hardware and software vendors and solutions.
4. **AI compliance, security, and responsible use:** Verify if the compliance and security expertise, clearance, and methodologies offered by IT services firms align with the constantly evolving AI regulations and policies that apply in their jurisdiction.
5. **Co-innovation:** Evaluate whether these co-innovation channels are built to help services firms showcase their thought leadership or whether they provide genuine access to experts and connections with academia and emerging tech startups.
6. **Geographical footprint:** Government executives should consider how accessible these capabilities and competencies are in their specific jurisdiction, instead of requiring services firms to mobilize resources from other countries and regions, which could result in more expensive staff and longer time to value.

## 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 opportunities.

### Accenture

IDC has positioned Accenture in the Leaders category in this 2025 IDC MarketScape for Worldwide AI Services for National Civilian Government.

### Background

Accenture employs about 791,000 people and serves clients in over 120 countries. Its public service practice comprises approximately 125,000 dedicated practitioners and includes its U.S. subsidiary Accenture Federal Services (AFS), which supports 60 U.S. federal civilian agencies. Accenture's AI professional-services portfolio includes the following:

- **Accenture AI Refinery (NAV AI for the public sector):** An AI multi-agent platform designed to be deployed in commercial cloud, air gapped, or on-premises environments to enable workers to build and deploy agentic teams. NAV AI includes an encrypted proof-of-compliance solution for run-time attestations of data, AI, and computational compliance.
- **FedGenius:** Designed for U.S. federal agencies, FedGenius is a generative AI (GenAI) and agentic AI platform for employing large language models (LLMs) to scale GenAI for knowledge work productivity.
- **Data readiness for GenAI:** Accenture's Data Readiness Solution helps to assess data maturity and enhance data governance and security through advanced measures and federated governance. The company's enterprise data platform architecture supports data processing and reusable and governed data products.
- **Scaled AI centers of excellence (COEs):** These COEs focus on AI, GenAI, and agentic AI adoption to test, evaluate, and benchmark solutions. Accenture's COEs in Brussels, London, Singapore, Chicago, Washington, D.C., and Dubai have developed AI frameworks for the public sector, with a focus on value realization, responsible AI strategy and road map, governance, risk management, workforce transformation, and talent upskilling.
- **Enterprise IT modernization:** By leveraging AI tools such as GenWizard, Accenture helps IT professionals accelerate system transformations through technology delivery tools to automate code generation, documentation, and system/data migration.

- **AI Navigator for scaled AI adoption:** This AI-based platform is aimed at helping governments make informed decisions, define business cases, prioritize AI initiatives, enable data readiness, and reimagine workflows.
- **LearnVantage and AI Academy:** Accenture offers learning strategies and solutions to develop talent and skills.
- **AI labs and studios:** Accenture has established AI studios in Brussels, London, Bengaluru, Kyoto, Singapore, San Francisco, Washington, D.C., and Chicago, with additional centers planned in Abu Dhabi, to co-create, prototype, and test AI solutions in collaboration with government clients and partners.
- **Center for Advanced AI:** The center focuses on solutions development and R&D to address issues such as reliability, computational accuracy, and adversarial AI detection.

Accenture combines organic growth with acquisitions — over 20 in the past two years, including Cognosante (U.S. federal health and civilian specialists), Customer Management IT/SirfinPA (Italian justice and public-safety consultants), and Parsionate (EU data product and data foundation services). In August 2025, Accenture announced its intent to acquire NeuraFlash, a U.S. company with Salesforce and AWS AI expertise.

Accenture invests in certifications, frameworks, and memberships relevant to national civilian agencies (e.g., ISO/IEC 27701:2019, ISO 27001:2022, and ISO 27017 and 27018). It also contributes to global AI governance, including through the EU AI Act High-Level Expert Group, the EU AI Act pilot process, and the CEN/CENELEC JTC 21 working group.

Accenture's Responsible AI Suite and pool of experts offer the ability to assess readiness and apply guidelines such as NIST's AI Risk Management Framework and Generative AI Profile; the Monetary Authority of Singapore Fairness, Ethics, Accountability, and Transparency (FEAT) Principles; the EU AI Act and EU Ethics Guidelines for Trustworthy AI; and the Australian Voluntary AI Safety Standard.

## Strengths

Accenture's focus on the national civilian government market is evident in:

- **Mission-specific AI accelerators and expertise for government:** The federal AI Solution Factory ships pretrained eligibility rules, data model blueprints, LLM workflow agents, and fraud detection models that agencies can use to shorten pilot-to-production cycles. Accenture's mission-specific expertise and solutions, including AI agents, cater to social protection agencies, financial market authorities, grantmaking agencies, tax agencies, and more. Its multi-agent solutions focused on government workforces are designed to reduce backlogs, address demographic challenges in hiring and retaining specialized talent, and materially improve government services. The

company's focus on deploying multi-agents at scale is intended to enable safe and secure workforce transformation. Accenture's compliance with international standards and national certifications such as the EU AI Act, AI Refinery FedRAMP-High "sovereign pods," and NVIDIA-based confidential computing helps governments meet compliance and security requirements.

- **Centers of excellence and innovation studios:** The Dock, a hub in Dublin, Ireland; the AFS Federal Digital Studio and Innovation Hub in Washington, D.C.; and other innovation centers and studios around the globe offer federal civilian government agencies the opportunity to co-design AI prototypes using agile governance and human-centered design methods.
- **Ecosystem co-innovation:** Partnerships with Palantir, AWS, Anthropic, Google, Microsoft, Dell, NVIDIA, EQTYLAB, and others offer governments a wide spectrum of skills and knowledge to accelerate AI innovation.

## Challenges

- **Cost and procurement complexity:** Like other systems integrators, Accenture faces closer scrutiny in terms of value for money. Although government-specific solutions and expertise can accelerate delivery, agencies may struggle to forecast the total cost of ownership for GenAI and agentic AI projects spanning multi-year contracts, from pilot to operations.
- **Portfolio complexity:** The company's extensive catalogue — AI Refinery, Distiller, XDR, Solution Factory, and Cloud Factory — can overwhelm procurement teams; additional architecture stewardship is often needed to prevent overlap in licenses and SLAs.

## Consider Accenture When

- National civilian agencies worldwide need support with large-scale AI system implementation and legacy modernization. Federal civilian agencies need to scale new AI workloads or leverage AI to modernize large-scale legacy systems; they also require GenAI-driven workbenches combined with mission-specific expertise for code documentation, testing, refactoring, and engineering.
- National civilian agencies worldwide need flexible deployment options. Federal agencies need advisory and execution services to support the implementation of alternative deployment models, from air gapping to public cloud, depending on sovereignty, compliance, security, and mission requirements.
- National civilian agencies worldwide need expertise in responsible AI. Federal agencies need advisory and implementation expertise to design transparent AI governance, from data lineage to bias monitoring and content provenance, that meets international standards and guidelines.

### 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, menu of services, and how well aligned the vendor is with customer needs. The capabilities category focuses on the capabilities of the company and the product today, here and now. In 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 total estimated revenues that each vendor generated in the national government market in 2024, including all services they sell, not only AI. Please note that this total includes national security, defense, and intelligence; however, the AI services offered to this national government industry subsegment are the focus of a separate, dedicated MarketScape.

### IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

### Market Definition

IDC defines AI services as the combination of project-oriented services (e.g., business and IT consulting, systems integration, and custom application development), managed services (e.g., application management, IT outsourcing, and hosting infrastructure services), and support services (e.g., hardware and software deploy and support, and IT training). For this MarketScape, IDC will consider project-



oriented services, managed services, and support services aimed at designing, implementing, and operating AI platforms and applications.

IDC defines federal/central governments as the civilian departments and agencies delivering public administration missions, as described by NAICS code 92 and NACE code 84-Section O, at the national level. This excludes national defense and intelligence departments and agencies, state and local governments, public schools and universities, public hospitals and other health institutions, and public corporations such as utilities, public transit, or postal services.



### Related Research

- *IDC MarketScape: United States AI Services for U.S. Defense and Intelligence Agencies 2025 Vendor Assessment (forthcoming)*
- *IDC MarketScape: Worldwide AI Services for State and Local Government 2025 Vendor Assessment (forthcoming)*
- *IDC MarketScape: Worldwide Software Platforms for National Civilian Government AI-Powered Personalized Digital Experiences 2025 Vendor Assessment* (IDC #US53009125, September 2025)
- *IDC ProductScape: Worldwide Software Platforms for National Civilian Government AI-Powered Personalized Digital Experiences 2025* (IDC #US53009225, September 2025)
- *Agentic AI in National Civilian Governments in the Efficiency Everywhere Era* (IDC #EUR153686825, August 2025)
- *Case Management Solutions for National Civilian Governments* (IDC #EUR153687425, August 2025)
- *IDC MarketScape: Worldwide Artificial Intelligence Services 2025 Vendor Assessment* (IDC #US52978525, July 2025)
- *IDC PlanScape: An Action Plan for Digital and AI Sovereignty for National Government IT Leaders* (IDC #US52806125, June 2025)
- *The Impact of AI Agents in National Civilian Government: Social Benefit Appeal Use Cases and Beyond* (IDC #EUR153382125, June 2025)

### Synopsis

Global and regional services firms are scaling up their investment in AI expertise and solutions by investing in AI frameworks to help governments accelerate the ideation, design, data readiness, and implementation of AI innovations to drive mission impact. They are expanding their partnership ecosystems to ensure that AI workloads can be deployed across public, private, hybrid, and sovereign cloud environments and that multiple AI models can be leveraged. Furthermore, they are using AI and AI agents to embed automation in their IT operations, software development life cycle, and cybersecurity service offerings, committing to AI compliance, security, and responsible use and co-innovating with customers and partners.

“To get the most out of the IT services firms’ AI offerings, national civilian government agencies should evaluate the breadth and depth of AI mission-specific solution accelerators, the ability to mobilize government experts in a certain jurisdiction, the ability to deliver out-of-the-box compliance and security tools and methodologies, and the AI partner ecosystem.” — Research Director Massimiliano Claps, IDC

## ABOUT IDC

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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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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