

IDC MarketScape: Worldwide AI-Driven Digital Strategy and Consulting Services for Oil and Gas Companies 2026 Vendor Assessment

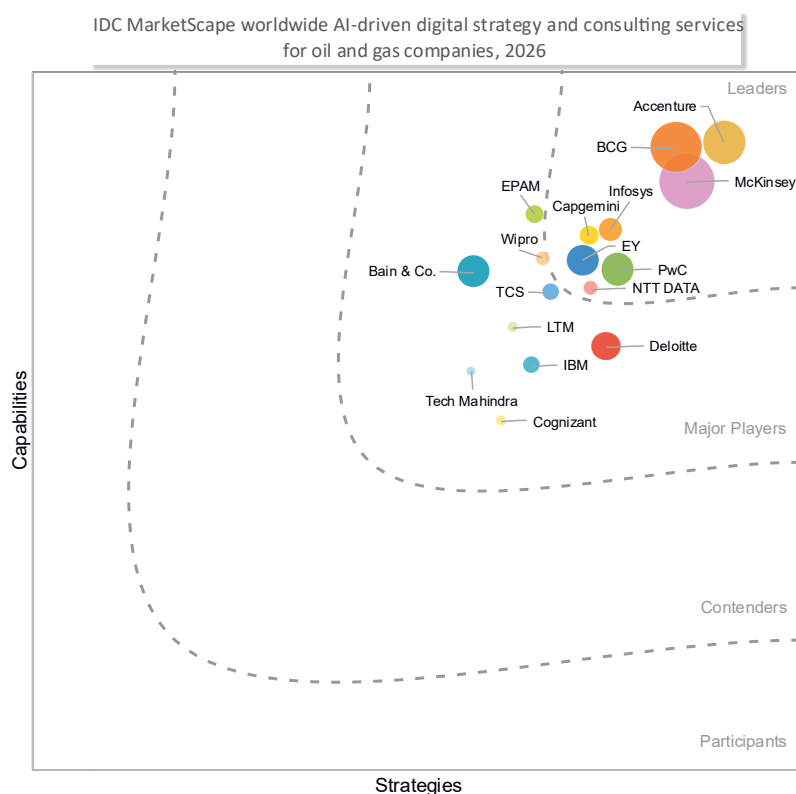
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THIS EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide AI-driven digital strategy and consulting services for oil and gas companies vendor assessment



Source: IDC, 2026

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide AI-Driven Digital Strategy and Consulting Services for Oil and Gas Companies 2026 Vendor Assessment (Doc # US54134126).

IDC OPINION

This IDC MarketScape assessment arrives at a point where AI has moved from the periphery of the O&G digital agenda to the center of it. IDC predicts that by 2028, 80% of major O&G companies will have AI initiatives mandated at the board level, a structural shift that is redefining how assets, capital, and people are deployed for efficiency and resilience (see *What the Future Holds for AI in the Oil and Gas Industry: IDC Energy Insights' View 2026*, IDC #US53396326, July 2026).

The demand for consulting reflects where operators actually sit on the maturity curve. IDC's 2026 *Energy and Utilities Industry-Specific Tech and Innovation Survey*, covering 269 O&G respondents worldwide, found that 42% of O&G companies remain in the early to middle stages of AI adoption, characterized by isolated experimentation and initial integration, while about 35% have reached a strategic expansion stage that aligns investment and shared platforms across business units. The barrier to scale is rarely the technology. It is legacy infrastructure, fragmented data, and the organizational and process change that AI at scale demands (see *IDC Survey: AI Maturity, Scaling Challenges, and Investment Focus in Worldwide Oil and Gas, 2026 — Insights from IDC's 2026 Energy and Utilities Industry-Specific Tech and Innovation Survey*, IDC #US54025426, May 2026).

That gap defines the market for AI strategy consulting in O&G. Operators are not short of use cases. They are short of a prioritization logic tied to asset economics, an operating model that can absorb AI into safety-critical workflows, and a data foundation that makes exploration, production, and commercial decisions AI ready. The firms assessed here compete on their ability to translate subvertical-level processes and operational complexity into board-level value and a workable transformation agenda, rather than on the length of their use case catalog.

IDC sees the competitive field splitting along recognizable lines. Strategy-led houses bring depth in value framing, operating model design, and change leadership and increasingly pair this with hands-on build capability. Technology-led consultancies and the consulting arms of large integrators bring engineering scale, platform assets, and delivery muscle and are moving up into advisory. The result is a market where the advisory high ground and the delivery high ground are converging and where credible differentiation now requires both

O&G domain fluency across upstream, midstream, downstream, trading, and the enterprise and demonstrable AI engineering behind the advice.

Several patterns separated stronger performers in this assessment. Leaders combine dedicated O&G practitioners with large AI and data talent pools, structure engagements for client capability transfer rather than dependency, and back their recommendations with responsible AI, governance, and risk frameworks fit for regulated, safety-critical environments. They treat data and subsurface readiness as a strategy pillar, not a downstream technical task.

The conversation with clients has also shifted. For much of the past decade, digital initiatives were justified through efficiency and cost. Today, the emphasis has moved toward resilience and strategic optionality, with AI positioned as a core enabler of production optimization, asset performance, and emissions goals (see *Industry Market Trends: Worldwide Oil and Gas, 2026*, IDC #US53625526, April 2026). For technology leaders, this IDC MarketScape is a tool to distinguish vendors that can genuinely operate at both the strategic and operational levels from those strong in only one and to hold prospective partners to evidence of outcomes in O&G rather than generic AI credentials.

IDC MARKETScape VENDOR INCLUSION CRITERIA

IDC analysts stipulated that to be considered in this IDC MarketScape vendors meet the following minimum criteria:

- The vendor has an established reputation working with oil and gas companies. A minimum market share is not required.
- The vendor has, indicatively, above \$50 million of estimated total AI consulting revenue in the worldwide oil and gas market for calendar year 2025. A minimum revenue threshold is not mandatory.
- The vendor has an established consulting practice providing business and digital strategy consulting to support O&G companies' business and operating model transformation needs, across at minimum two areas — organization, omni-experience, operating model, information, or leadership — as part of an AI-led business transformation initiative.
- The vendor has expertise and experience supporting O&G business and operational processes across the value chain. Vendors with limited offerings that cater only to specific business processes, and that do not serve other key business domains such as exploration, production optimization, field development, crude oil transportation, LNG, and refining, were excluded.

- The vendor delivers AI consulting services to O&G companies in at least two regions across different continents (North America, Latin America, Europe, the Middle East, Africa, or Asia/Pacific).

ADVICE FOR TECHNOLOGY BUYERS

- **Anchor AI ambition to asset economics, not novelty.** Start from the P&L and the asset base. The strongest consulting partners begin with your business goals and constraints, then help you decide whether, where, and when AI will create measurable value rather than pushing generative or agentic AI because it dominates the conversation.
- **Insist on O&G domain fluency across the value chain.** Look for partners that can move credibly across upstream, midstream, downstream, trading, and enterprise functions such as HSE, finance, and emissions. Generic AI strategy without sector depth will stall when it meets subsurface, operational, and safety-critical realities.
- **Treat data and subsurface readiness as a strategy pillar.** IDC research shows scaling is blocked by fragmented data and legacy infrastructure more often than by algorithms. Favor partners that build data unification, governance, and AI-ready foundations into the strategy itself rather than deferring them to a later technical phase.
- **Demand an operating model and change agenda, not a use case list.** Value comes disproportionately from people and process change. Choose partners that design the operating model, workflows, and ways of working around AI and that plan explicitly for workforce enablement and adoption.
- **Require responsible AI, governance, and risk built for regulated environments.** O&G decisions carry safety, environmental, and financial consequences. Prioritize partners with governance frameworks, model risk management, and responsible AI practices suited to high-consequence, regulated operations.
- **Structure engagements for capability transfer.** Guard against dependency. Prefer build-operate-transfer approaches and engagements designed to leave your teams able to own, run, and extend AI initiatives over time.
- **Use this IDC MarketScape to short-list and to test commercial models.** Apply this assessment in vendor selection and negotiation. Use it to short-list, to probe where each firm is genuinely differentiated at the strategic and operational levels, and to test appetite for outcome-based commercial models in orals and proposals.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each criterion outlined in the Appendix, the description in this section reviews each vendor's specialized AI practices, highlighting strengths and challenges in their offerings across the oil and gas industry.

Accenture

After a thorough evaluation of Accenture's strategies and capabilities, IDC has positioned the company in the Leaders category in this 2026 IDC MarketScape for worldwide AI-driven digital strategy and consulting services for oil and gas companies.

Company overview

Accenture, headquartered in Dublin, Ireland, is a global professional services company specializing in strategy, consulting, digital, technology, and operations, with roughly 786,000 employees operating across more than 120 countries. Its oil and gas practice sits within its Resources group, representing a substantial, multibillion-dollar slice of that portfolio of sectors. Evidence gathered during the IDC briefing points to rapid, double-digit growth in the firm's worldwide O&G AI consulting revenue year over year off an already sizable base.

Accenture maintains a large O&G consulting client roster spanning supermajors, national oil companies, and regional operators across North America, Europe, the Middle East, and Asia/Pacific. Its consulting model is deliberately services led: rather than selling standalone tools, Accenture embeds AI into core workflows down to L3 and L4 processes and ties transformation to measurable business outcomes. This vision is underpinned by a multiyear, multibillion-dollar data and AI investment and a commercial shift toward outcome-based and IP-led constructs. Investments in the knowledge base and collaborations with hyperscalers and AI platform providers such as Microsoft, AWS, Databricks, OpenAI, and Anthropic aim to enhance interoperable AI workflows.

AI consulting practice for oil and gas industry

Accenture fields a large-scale global O&G practice, with several thousand dedicated O&G practitioners working alongside a much larger pool of AI and data professionals, including a specialized cohort that holds both AI and O&G expertise. Consulting delivery draws on proprietary IP such as ART (Assess, Rationalize, Transform), the Enterprise Technology Blueprint, Strategy IQ, and AI Refinery, an enterprise agentic platform that orchestrates agents, models, data pipelines, and governance. The practice runs O&G-relevant innovation hubs and GenAI Studios in Houston, Perth, Milan, Sophia Antipolis, Bengaluru, and Riyadh.

Across upstream, midstream, and downstream, Accenture organizes its AI consulting around what it calls mega processes, cross-value chain workflows that connect subsurface

interpretation, drilling, production, asset management, supply chain, and commercial decisions instead of isolated point cases. For asset integrity, seismic and reservoir work, and production optimization, it combines the physics-AI hybrid Cerebra platform (acquired with Flutura) with its Industry X Intelligent Operations framework and digital twins, an approach suited to the data-sparse, safety-critical environments common in brownfield assets. Recent acquisitions deepen this bench: RANGR Data and Decho for Palantir Foundry and AIP delivery, and Faculty for decision intelligence, simulation, and AI safety. Accenture is a Gold Member of the OSDU consortium and codevelops O&G solutions with Microsoft, AWS, Google Cloud, and NVIDIA, including a methane emissions monitoring platform and a production-grade agentic framework now deployed at a European integrated energy major.

Distinctive AI consulting services delivered

The following engagements illustrate Accenture's AI-driven digital strategy and consulting services:

- **Client challenge:** A European integrated energy major needed to evolve from foundational digital capabilities into end-to-end agentic process reinvention.
AI solution and impact: Accenture defined an agentic reinvention road map and built a custom agent platform on Azure using its AI Refinery framework (codeveloped with NVIDIA and now in production at Repsol), stood up a generative AI center of excellence, and codeveloped AI agents alongside workforce enablement to embed AI into planning, forecasting, and operations. The broader multiyear digital transformation returned substantial free cash flow, and a structured agent pilot delivered material weekly productivity gains at high active-user adoption.
- **Client challenge:** A global O&G operator sought to shift from an asset-centric operating model to a market-responsive LNG portfolio model.
AI solution and impact: Accenture applied its ART methodology to systematically identify, prioritize, and industrialize AI opportunities across the LNG value chain, with its digital twin and intelligent-operations capabilities underpinning an AI-driven portfolio-optimization layer deployed across six plants and more than 25 vessels. The solution compressed decision-making cycles from weeks to hours and generated more than \$90 million in realized incremental revenue, with double-digit improvement in business performance.

Strengths

- **Deep hybrid talent at scale with structured client capability transfer:** The combination of a large, dedicated O&G practitioner base, a very large AI and data workforce, and several referenceable customers with advanced AI-GenAI projects — spanning subvertical and business processes — delivered in the past fiscal year supports proven pilot-to-production scaling experience across the full value chain.

- **End-to-end delivery capabilities and AI ecosystem:** Accenture combines strategy, consulting, engineering, and operations into a single enterprise-scale transformation model spanning the full value chain, underpinned by deeper AI and hyperscaler partnerships (Microsoft, AWS, Google Cloud, NVIDIA). The company codevelops sector-specific assets, for instance, a methane monitoring platform and a production-grade agentic framework running at a European integrated major. Strategic alliances and Gold membership in the OSDU consortium reinforce its subsurface data credibility.
- **Strong customer validation:** Oil and gas customers highly praise Accenture for AI, generative AI, and agentic AI expertise and strategic vision, describing their experience as clearly differentiated in complex O&G environments and praising a domain-led, partnership-based delivery model that produced tangible, measurable results.

Challenges

- **Uneven agentic AI maturity:** Agentic AI maturity is uneven across the value chain. By Accenture's own assessment, coverage is strong in upstream operations, midstream, and downstream refining and retail, but prebuilt reference architectures for subsurface, well operations, LNG, and trading are still maturing.
- **Perception of premium pricing:** Pricing perception is a recurring theme in reference feedback. Customers noted that Accenture's fees can run high relative to alternatives, and while value for money was still viewed favorably, the perception may weigh against the firm in competitive, cost-sensitive consulting selections.

APPENDIX

Reading an IDC MarketScape graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents IDC Energy Insights' best estimates of the vendor's market share within the specific market segment being assessed — worldwide oil and gas companies' AI-driven digital strategy and consulting services.

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

AI-driven digital strategy and consulting services

This IDC Energy Insights' IDC MarketScape assesses the capabilities and strategies of known consulting providers in enabling and supporting oil and gas companies in their AI-driven digital strategy and consulting services journey. This study provides a worldwide perspective.

For the purpose of this study, IDC defines AI-driven digital strategy and consulting services as the process by which enterprises adapt to or drive disruptive changes in their businesses and operating models by leveraging artificial intelligence, data-driven insights, and related digital competencies to shape business strategy, operating priorities, and transformation agendas. These services focus on helping enterprises identify, prioritize, and design AI-enabled opportunities that create new sources of value, improve decision-making, and enhance business resilience and competitiveness.

AI-driven business and digital strategy and consulting involve enterprisewide change requiring innovation across organization (workforce, skills, and ways of working), omni-experience (customer, partner, and employee experience), operating model (business model, workflows, and process changes), information (data strategy, governance, and insight generation), and leadership (vision, governance, investment priorities, and change leadership), as part of an AI-led business transformation initiative.

This document specifically looks at the following vendor service offerings to oil and gas companies: AI strategy consulting services (including business strategy, transformation strategy, use case identification and prioritization, operating model design, governance, and

responsible AI advisory) and AI innovation and transformation consulting services (including road map development, value realization planning, organizational change advisory, and industry-specific AI business transformation advisory).

LEARN MORE

Related research

- *What the Future Holds for AI in the Oil and Gas Industry: IDC Energy Insights' View 2026* (IDC #US53396326, July 2026)
- *Industry Go-to-Market Handbook: Worldwide Oil and Gas, 2026* (IDC #US53621726, June 2026)
- *IDC Survey: AI Maturity, Scaling Challenges, and Investment Focus in Worldwide Oil and Gas, 2026 — Insights from IDC's 2026 Energy and Utilities Industry-Specific Tech and Innovation Survey* (IDC #US54025426, May 2026)
- *Industry Market Trends: Worldwide Oil and Gas, 2026* (IDC #US53625526, April 2026)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2026: Agile Energy (Oil and Gas)* (IDC #EUR154270126, February 2026)

Synopsis

This IDC study represents a vendor assessment of the worldwide AI-driven digital strategy and consulting services market for oil and gas companies through the IDC MarketScape model. The assessment discusses both quantitative and qualitative characteristics that explain success in this market. It covers 17 vendors participating in the AI-driven digital strategy consulting space for oil and gas. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another and highlights the factors expected to be most influential for success in both the short term and the long term.

“In oil and gas, the winners in AI strategy and consulting are the firms that turn subvertical-level business and operational complexities and bottlenecks into board-level value and a workable operating model that actually holds, not the ones with the longest use case list. Domain fluency across the value chain, a data-ready foundation, and disciplined change leadership now matter more than AI novelty,” says Gaurav Verma, research director, IDC Energy Insights.

ABOUT IDC

International Data Corporation (IDC) is the premier global market intelligence, data, and events provider 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 and industry opportunities and trends in over 110 countries. IDC's analysis and insight help IT professionals, business executives, and the investment community make fact-based technology decisions and achieve their key business objectives.

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