IDC MarketScape

IDC MarketScape: Worldwide AI-Driven Business Cycle in the Media Industry 2026 Vendor Assessment

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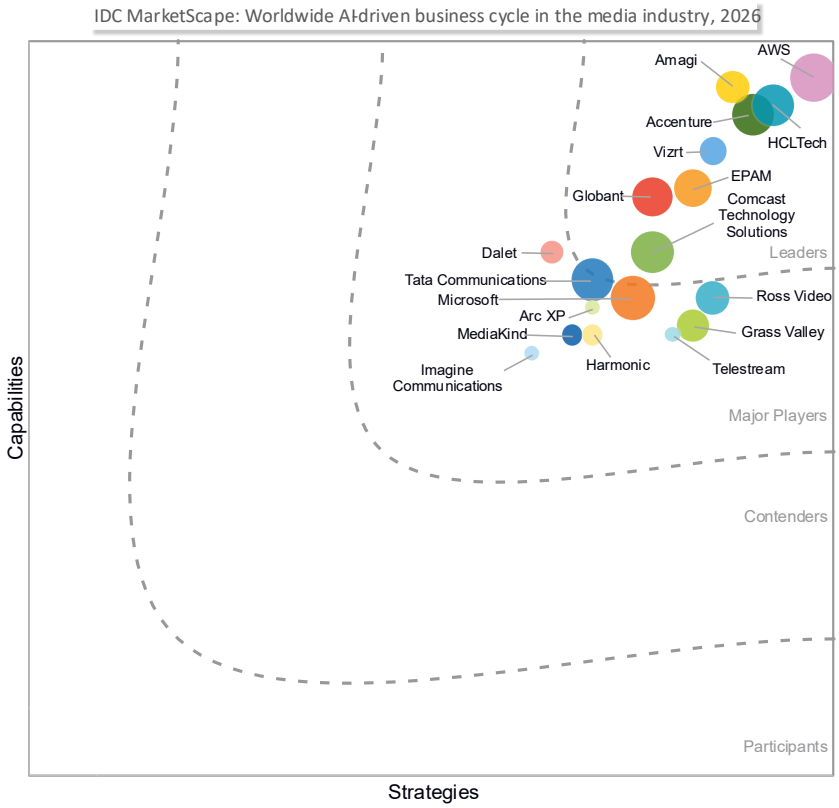
THIS EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide AI-driven business cycle in the media industry vendor assessment



Source: IDC, 2026

September 2026, IDC #US54113826e

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 Business Cycle in the Media Industry 2026 Vendor Assessment (Doc #US54113826).

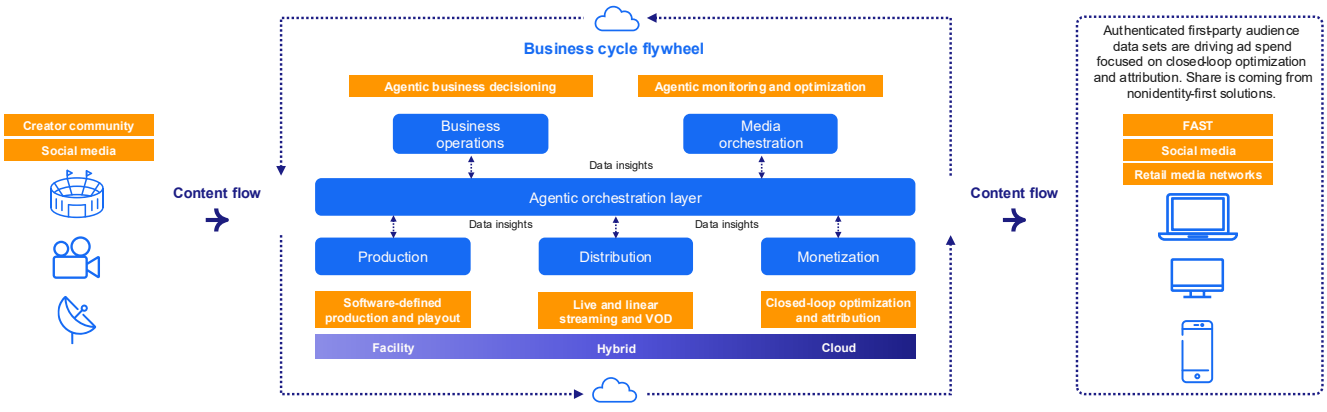
IDC OPINION

The media business is consolidating around an agentic orchestration layer that ties cloud infrastructure to the five operational pillars of the modern content cycle: business operations, media orchestration, production, distribution, and monetization. The business cycle flywheel shown in Figure 2 frames this shift. AI agents now perform decisioning, monitoring, and optimization work that previously required manual coordination across siloed teams, vendors, and tools, compressing the path from creative concept to audience attribution and tightening the link between investment and outcome.

Three forces define the 2026 starting point. First, authenticated first-party audience data is becoming the basis for ad spend as cookie-based identity continues to erode. Second, FAST channels, social platforms, and retail media networks are absorbing audience share that used to be held by linear and standalone subscription video. Third, media operations now run across facility, hybrid, and cloud footprints rather than committing fully to any single model. The agentic orchestration layer is what makes these conditions tractable at the speed audiences and advertisers expect.

FIGURE 2

The media business cycle ecosystem orchestrated by agentic AI



The agentic orchestration layer sits at the center of the modern media business cycle, connecting cloud infrastructure and core business operations with AI-driven media orchestration. Together, these layers power seamless multiplatform production, distribution, and monetization across the entire content life cycle.

Source: IDC, 2026

The five pillars in 2026

Agentic adoption is uneven across the cycle. Decisioning and optimization functions are advancing fastest because their inputs are already structured data. The production and orchestration pillars are catching up as agents move from prompt-driven copilots into closed-loop execution. The pillar-by-pillar view that follows tracks where the work stands in 2026.

Business operations

Agents now sit on top of CRM, ERP, rights management, and finance systems, running revenue forecasting, rights and royalties reconciliation, contract review, and competitive monitoring. Most 2026 deployments are still supervised, with a human signing off on board-level outputs, but routine work such as license window analysis, talent deal modeling, and counterparty risk scoring runs without intervention at the largest media companies. The measurable wins are time to decision and head count redeployment rather than cost-out alone.

Media orchestration

Media orchestration is where agentic value compounds. Orchestration agents schedule programming across linear, streaming, FAST, and social channels, respond to performance signals in near real time, and coordinate the upstream metadata, rights, and ad decisioning systems that the operational pillars depend on. The leading 2026 deployments handle channel scheduling and ad break optimization end to end. Midmarket broadcasters are using point agents for specific tasks such as promo placement and last-minute schedule changes.

Production

Software-defined production and playout are the entry points. Agents handle log-and-tag and highlight selection, multilanguage localization, graphics generation, and quality control. Live sports and news are the proving grounds because the production cycle is short and the value of seconds saved is obvious. Scripted episodic work uses agents primarily in post, including assembly editing, color matching, and dialogue cleanup, while preproduction agents for casting, scheduling, and budgeting are in pilot at the major studios.

Distribution

Distribution agents manage encoding profiles, CDN selection, multi-CDN failover, and per-title and per-scene quality decisions across live linear, FAST, and VOD. Work that previously required a video operations engineer monitoring dashboards now runs continuously, with the agent surfacing exceptions rather than telemetry. Localization and

platform-specific packaging, which means getting the same title onto a dozen devices and partner endpoints with the right metadata and DRM, is the next adoption beachhead.

Monetization

Closed-loop optimization and attribution are the destination states. Agents integrate first-party audience data, ad server logs, and outcome signals into continuous bidding, creative selection, and yield decisions. Nonidentity solutions, including contextual, cohort-based, and clean room methods, are orchestrated by agents that determine which mix performs best for each buyer. Share of ad spend is moving from open web display toward FAST, social, and retail media networks, and the agents that can plan across those channels are pulling budget toward platforms that expose them.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The IDC MarketScape and IDC ProductScape for media and entertainment (M&E) focus on the application of agentic AI and AI agents in products and services. Coverage spans consultation, design and integration, project management and deployment, training, and cloud-based business operations, media orchestration, production, distribution, and monetization. Products, services, and platforms that span all pillars with strategic partner involvement (business operations; media orchestration; production across live, post-production, and playout; distribution across connected TV, mobile, and web; and monetization across advertising, subscription, and transactional services) are viable as turnkey solutions and carry additional weight in the analysis. The assessment emphasizes best practices in consultative services and strategic planning, design, integration, advanced technologies such as agentic AI and AI agents, data analysis, and insights that deliver real-time integration into business operations for intelligent decisioning aimed at profitability. Coverage is worldwide and limited to major market share technology vendors offering solutions worldwide. Vertical markets covered include broadcast television stations, networks, and media programmers offering over-the-top (OTT) streaming services and distribution, alongside motion picture studios with direct-to-consumer business models.

A critical point in this research effort is to meet the following criteria:

- Any vendor participating in this IDC MarketScape and the companion IDC ProductScape should be able to showcase that it generates at least $50 million in revenue annually for its M&E consultation, design and integration, products and/or services, and applications practice worldwide. This does *not* include revenue coming from corporations, government, education, house of worship, or other non-M&E customers.

- A vendor should also be able to showcase that revenues coming from M&E customers span across each of the IDC defined regions, namely North America, Latin America, EMEA, and APAC, and achieved this in 2025 to demonstrate global scope.

ADVICE FOR TECHNOLOGY BUYERS

The 2026 vendor assessment makes one shift clear: agentic AI in media is no longer a feature inside an application; it is a layer that orchestrates across applications, vendors, and clouds. The buyer's question has changed from which AI tool to which orchestration architecture, anchored by which platform, governed by which framework, and consumed under which commercial model. The recommendations that follow translate that shift into the procurement and architecture decisions media organizations should make through 2027.

Anchor the architecture at the orchestration layer

Treat the agentic orchestration tier as the first architectural decision, not the last. Evaluate it on cross-pillar coordination — production output feeding distribution decisions, feeding monetization signals, and feeding business operations — rather than on feature parity within any single domain. Several distinct orchestration approaches express this design point differently; each requires the orchestration layer to be selected before the pillar vendors plug into it. Inverting that sequence locks the orchestration choice into whichever specialist arrived first, and re-architecting later costs more than getting it right at the front.

Make standards posture a procurement filter

Treat Joint Task Force on Dynamic Media Facility (JT-DMF), Media eXchange Layer (MXL), TAMS, and Model Context Protocol (MCP) support as a procurement filter, not a footnote. Require MCP-native posture as nonnegotiable in any orchestration tier evaluation — its absence is a forecast integration line item, not a future-state nice-to-have. Treat TAMS as the metadata addressing standard for new content infrastructure and as the migration target for legacy MAM and DAM, so agentic reuse and monetization are designed once rather than rebuilt per agent. Align JT-DMF and MXL compatibility with facility capital programs on the same procurement timeline as cloud-native renewal rather than retrofitting them onto fixed-function gear the agent layer cannot address natively. Score every vendor in the agentic stack against three questions: which standards are adopted and production-shipping today, which are on the road map with a credible delivery date, and which are tracked or evaluated without commitment. Weigh the integration cost line in the business case against the answers. Vendors with shipping support across MCP and TAMS and credible road maps on JT-DMF and MXL minimize integration debt and protect optionality as the orchestration tier consolidates through 2027 and 2028; vendors with noncommittal postures across all four (i.e., DMF, MXL, TAMS, and MCP) create the integration cost and re-architecture risk that consolidation will expose.

Match the vendor archetype to the workload

The 2026 cohort splits into four archetypes that map to different procurement questions. Hyperscaler-led vendors provide the platform substrate and model choice; pick them when standardization on the cloud estate matters more than packaged media vertical breadth. Global systems integrators (SIs) deliver strategy, integration, and managed operations under one accountable team; pick them for multiyear, multipillar transformation programs. Specialist providers own purpose-built M&E platforms with depth in particular pillars; pick them when production-grade vertical capability matters more than horizontal breadth. Network and infrastructure incumbents anchor live contribution, broadcast distribution, and signal path reliability; pick them when carrier-grade live delivery is the gating constraint. Mixing two archetypes in the same architecture is normal; mixing all four creates integration debt the program cannot service.

Fix the data and rights foundation in parallel with agent deployment

Agents are only as useful as the data they can access. The most common reason 2025 pilots stalled was not model quality but fragmented metadata, inconsistent rights records, and contract terms that predate machine-driven exploitation. Treat metadata normalization, rights cleanup, and first-party data activation as funded programs with named owners and 2026–2027 milestones on the same governance track as the agentic deployment itself. Buyers that defer this work consistently report the same outcome: a successful proof of concept that cannot scale because the agent runs out of usable inputs at the second use case.

Stand up agent operations as a first-class function

Centralize model selection, prompt and policy management, output logging, evaluation harnesses, human-in-the-loop thresholds, and incident response under a defined operating discipline — separate from individual product teams. Leading vendors' agent operations frameworks give buyers a reference for what this function looks like internally: identity, observability, audit, and policy across every agent the organization runs. Distribute media domain knowledge to the pillar teams but hold operating discipline centrally. Operators that defer this through 2026 will pay for it in brand safety, regulatory, or rights exposure incidents that are harder to remediate than to prevent.

Push for commercial models that follow business outcomes

The vendors that performed well on commercial flexibility — spanning unified digital wallets, outcome-based and gain-share constructs, token-metered consumption models, and operations-based credit systems — have moved past time and materials (T&M) and seat licensing into pricing that tracks the work the agent actually performs. Buyers should engage

that conversation explicitly, particularly on programs where agentic capability replaces variable head count or directly generates yield. Match the commercial model to the value capture: outcome aligned for monetization uplift programs, consumption metered for high-volume AI workloads, and fixed subscription with documented unit economics for predictable operational pillars. Vendors that refuse to discuss alternatives to time and materials signal limited confidence in their own results.

Build for the 2027 monetization shift now

The clearest commercial signal in the 2026 cohort is the rotation of ad spend toward FAST, social, and retail media networks, paired with first-party authenticated audience data and closed-loop attribution. The vendors leading that conversation today — integrated ad decisioning suites, clean room and identity partnership integrations, and ad serving platforms gained through recent acquisitions — are productizing what the rest of the market still describes as road map. Identity activation, ad decisioning agent integration, and cross-channel measurement infrastructure each take 9–15 months to deploy at scale; operators that wait until ad spend rotation reaches their P&L will be 12–18 months late to capture it.

Plan for vendor consolidation through 2026–2028

The orchestration tier is consolidating in real time. Recent acquisitions and platform investments, together with the broader M&A pace through the rest of 2026, mean operators that lock into a five-year vendor relationship now will renegotiate from a weaker position in 18 months. Build contract terms that allow re-architecture: data portability clauses, open format export commitments on critical orchestration and metadata layers, MFN protections on pricing, and annual review windows on long-dated commitments. Reevaluate vendor relationships against the consolidating market every 12 months through 2028.

Treat the workforce transition as a funded program

The pace of contraction in traditional master control, video operations, and ad operations roles and the parallel growth in agent operations, data engineering, and prompt-and-policy roles are faster than most internal training programs are built to absorb. Name the roles that contract, the roles that grow, and the roles that are net new; resource the retraining and hiring programs against that map rather than against generic AI upskilling budgets. Internal mobility is faster and cheaper than external hiring for most of the new roles, but only if the program starts in 2026, not 2027.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Accenture

Accenture is positioned in the Leaders category in this 2026 IDC MarketScape for worldwide AI-driven business cycle in the media industry.

Accenture pairs proprietary M&E products with strategy consulting, systems integration, and managed operations under a single commercial relationship. The Media Suite combines Media Engage for OTT/IPTV, Media Sales for omni-channel ad sales, Media Ops for broadcast orchestration supported by agentic workflow automation, and Media Nexus as the agentic intelligence layer. The suite is supported exclusively by Accenture and sits above existing MAM, DAM, playout, and adtech investments rather than replacing them. Media Nexus runs on a dual-engine architecture — an Intelligence Engine for prediction, simulation, and ROI-driven decisioning and an Orchestration Engine for MCP- and Agent2Agent (A2A)-mediated execution across third-party tools — separating decisioning from execution. The M&E-specific agentic practice sits within Accenture's wider AI revenue base.

Strengths

- Media Nexus is the agentic intelligence and orchestration platform. It comprises a vendor-agnostic layer built on a dual-engine architecture (an Intelligence Engine for prediction, simulation, and ROI-driven decisioning and an Orchestration Engine for self-healing, MCP- and A2A-mediated execution across third-party tools) that decouples decisioning from execution and sits above existing MAM, DAM, playout, and adtech investments. Competitors orchestrating inside their own product ecosystems (Dalet Dalia, SDVI Rally next-gen, Blue Lucy, and Prime Focus CLEAR AI) cannot match the cross-vendor reach. As production proof, a content workflow was compressed from 4 hours to 4 minutes through coordinated Compliance, Versioning, and Scheduling agents.
- Media Ops delivers agentic, software-defined production at an industrial scale. Agentic workflow automation orchestrates broadcast operations across the supply chain, supported by a digital twin methodology with 700+ industry-benchmarked processes, intent-based natural language workflow authoring, and a Low-Code/No-Code AI Studio that gives operators direct control. Vrio's 30%+ OPEX reduction across five broadcast centers and the Hotstar, Formula 1, BT Sport, and Netflix NFL/WWE Raw deliveries are the proven precedents. Accenture commits to a 30%

operational cost reduction on managed services engagements, a contractual outcome stronger than reference-only proof points.

- Standards posture is broader than any orchestration-inside-product found in the market. MCP and A2A are the production integration standards across the Media Suite products (Media Engage 9.4 MCP servers — general availability [GA], March 2026), with open-by-design support for MovieLabs 2030, ST2110, IMF, and EIDR. Native support for JT-DMF, TAMS, and MXL is delivered through the Accenture partner ecosystem rather than inside Media Suite itself, a partnership-mediated path that buyers requiring those three standards should weigh against Accenture-owned execution.

Challenges

- Native support for JT-DMF, TAMS, and MXL (three standards becoming central to next-generation software-defined production) is not in Media Suite. Accenture delivers these through partner ecosystem implementations rather than as first-party products. Buyers procuring native support for these specific standards should expect partner-mediated delivery and the integration coordination that comes with it.
- Several execution layer agentic categories are partner provided rather than native. IDC ProductScape ratings of "Partner Provided" cover Live Production and Show Management, Channel Playout and Master Control, Native Cloud MAM/Storage/Archive, Encoding and Transcoding, CDN, Social/Gaming/Interactive Services Integration, DRM, Supply-Side Platform, and Server-Side Dynamic Ad Insertion. The architectural choice is deliberate (agentic orchestration above execution rather than ownership of every layer), and the Faculty (AI/decisioning) and Ookla (network performance data) acquisitions are positioned to deepen native capability in adjacent areas. Buyers seeking native ownership of execution layer capability will depend on Accenture-integrated third parties for those domains.
- Several agentic AI road map differentiators are deferred to 2027 or later. Fully autonomous L1/L2 operations, zero-touch metadata, autonomous deal origination, multitenant cross-client agent learning, and fully autonomous A2A workflows are not GA in 2026. Buyers procuring the most autonomous capabilities are partly buying on road map rather than current state.

Consider Accenture when

- Consider Accenture when cross-system agentic orchestration is the architectural requirement. Consider Accenture when the buyer is a tier 1 broadcaster, studio, or streaming platform with complex multisystem supply chains that have modernized infrastructure but have not solved cross-system coordination. Consider Accenture when Media Nexus and Media Ops orchestrate above existing MAM, DAM, playout, adtech, and delivery investments — through MCP and A2A integration, with agentic

workflow automation in Media Ops as the broadcast orchestration vehicle — rather than replacing them.

- Consider Accenture when software-defined production at an industrial scale is the operational mandate. Consider Accenture when the buyer needs to exit physical broadcast infrastructure for cloud-first managed operations, with Vrio's 30%+ OPEX reduction across five broadcast centers as the most direct precedent and Hotstar, Formula 1, BT Sport, and Netflix's NFL and WWE Raw deliveries as the live event reliability proof. Consider Accenture when three productized managed service offerings carry committed financial outcomes: 30–40% OPEX on broadcast channel managed services, approximately 30% on cloud-native content supply chain, and a 40% ad monetization increase on data-driven monetization.
- Consider Accenture when open standards interoperability is a procurement requirement and partner-mediated support for emerging standards is acceptable. Consider Accenture when MovieLabs 2030, ST2110, IMF, and EIDR are native across Media Suite. JT-DMF, TAMS, and MXL (three standards central to next-generation software-defined production) are available through the Accenture partner ecosystem rather than as Accenture-native implementations. Consider Accenture when buyers are comfortable with partner-mediated delivery on those three, and should treat this as a fit.

APPENDIX

Reading an IDC MarketScape graph

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

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

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

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape methodology

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

Market definition

For the purposes of this IDC MarketScape, the worldwide AI-driven business cycle in the media industry market is defined as the integrated set of platforms, software, services, and infrastructure that media and entertainment organizations use to embed agentic AI across the five operational pillars of the modern content cycle: business operations, media orchestration, production, distribution, and monetization. The defining characteristic of this market is the agentic orchestration layer that coordinates decisioning, monitoring, and optimization tasks across previously siloed teams, tools, and clouds — moving the industry past point AI features inside individual applications and into a unified operating model that ties creative concept to audience attribution.

Vendors qualify for inclusion when they sell or deliver one or more of the following to broadcasters, streamers, studios, service providers, sports rights holders, publishers, and other M&E enterprises: agentic orchestration platforms and agent runtimes scoped to media workflows; cloud-native or hybrid media processing, playout, contribution, distribution, and monetization software with embedded AI or agentic capabilities; managed services and systems integration engagements that productize agentic AI for media supply chains; and adjacent infrastructure (compute, identity, governance, and observability) consumed as a foundation for media agentic workflows. The market spans pure-play media specialists, global systems integrators, hyperscalers, network and infrastructure operators, and broadcast technology incumbents assessed against the same strategy and capability criteria, regardless of architectural origin. The 2026 assessment scope is worldwide, with regional revenue and customer evidence required across North America, Latin America, EMEA, and Asia/Pacific to demonstrate global scope.

LEARN MORE

Related research

- *NAB 2026 Insights and Observations* (IDC #US53411026, May 2026)
- *Retail Media Networks: Four-Level Maturity Framework and Agentic Impact* (IDC #US54486426, May 2026)
- *IDC Market Glance: Agentic AI Platforms, 2Q26* (IDC #US54286726, April 2026)
- *Software-Defined Media Production Update, 2026* (IDC #US53410926, February 2026)
- *Adtech 2030: Predictions for the Agentic Age* (IDC #US54226024, January 2026)

Synopsis

This IDC study assesses global vendors that enable AI-driven business cycle in the media industry, highlighting the shift from isolated AI features to an agentic orchestration layer spanning business operations, production, distribution, and monetization. The document details market trends, adoption trajectories, vendor strengths and challenges, and strategic recommendations, emphasizing that orchestration architecture, data governance, and outcome-based measurement are now central to competitive advantage and investment decisions for media organizations worldwide.

"In 2026, the media industry's competitive edge won't be defined by isolated AI features, but by the orchestration layer that unifies business operations, production, distribution, and monetization. The question is no longer which tool to buy, but which architecture to anchor your future on. Are you ready to compete at the speed of agentic intelligence?," asks Alex Holtz, research director for Media and Entertainment Digital Strategies at IDC.

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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