



IDC MarketScape

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

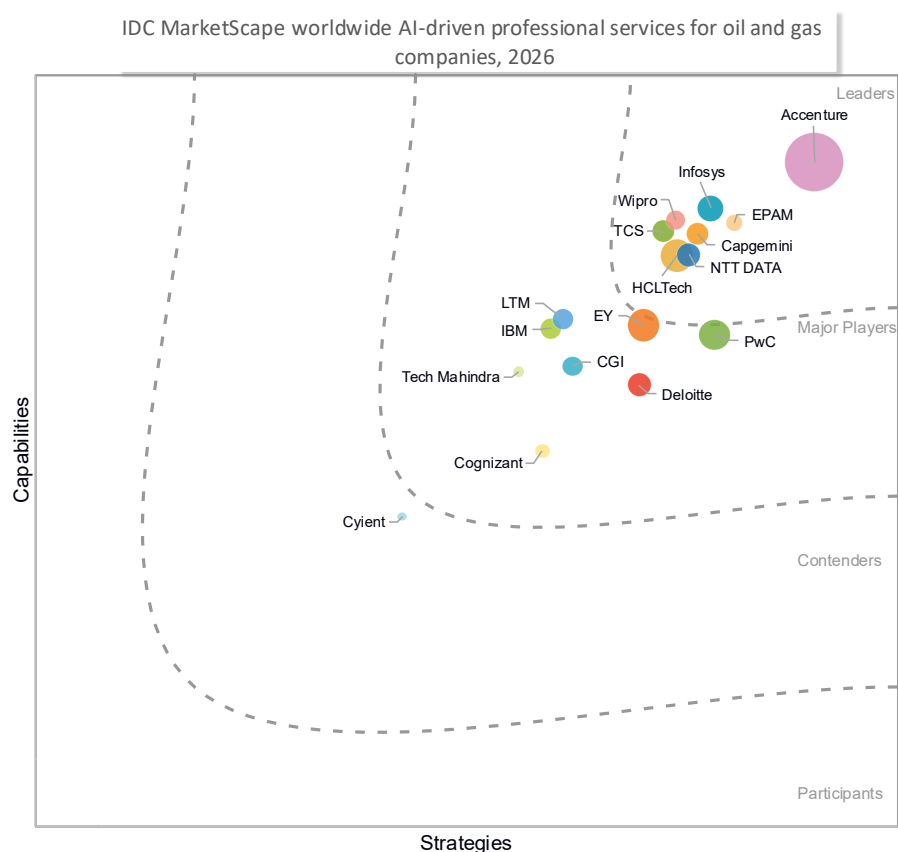
Gaurav Verma

THIS EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide AI-driven professional 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 Professional Services for Oil and Gas Companies 2026 Vendor Assessment (Doc # US54135126e).

IDC OPINION

This IDC study represents a worldwide vendor assessment of AI-driven professional services for oil and gas (O&G) companies through the IDC MarketScape model. Where strategy consulting frames the ambition, professional services determine whether that ambition reaches production. The assessment lands at a moment when O&G has largely settled the question of whether AI is useful and is now engineering the infrastructure, data, and delivery models required to run it at scale (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).

The maturity signal is clear. IDC predicts that by 2028, 80% of major O&G companies will have AI initiatives mandated at board level (see *What the Future Holds for AI in the Oil and Gas Industry: IDC Energy Insights' View 2026*, IDC #US53396326, July 2026), yet IDC's 2026 *Energy and Utilities Industry-Specific Tech and Innovation Survey* of 269 O&G companies worldwide found that 42% remain in early to middle stages of adoption and only about 35% have reached strategic expansion. The obstacle to scale is rarely the model. It is legacy infrastructure, fragmented data, and the operational discipline needed to embed AI into live workflows (see IDC #US54025426, May 2026).

That is the value proposition of the professional services firms assessed here. Their work is to implement, operationalize, and scale AI across O&G business and technology environments, embedding it into enterprise applications, infrastructure, workflows, and service operations. The strongest providers pair O&G domain knowledge with data engineering, cloud and edge infrastructure, platform integration, model deployment, and SLA-backed managed operations, and they can demonstrate movement from pilot to production rather than a portfolio of proofs of concept.

O&G places distinctive demands on this market. IDC data shows sector AI investment skews toward real-time data processing and edge deployment, because O&G operations happen at the edge, on offshore platforms, at drilling sites, inside pipelines, and in refineries, where latency is a safety and efficiency concern rather than a performance nicety (see IDC #US54025426, May 2026). Providers that converge IT, operational technology

(OT), and engineering technology (ET) deploy at the edge and industrialize delivery through reusable assets and accelerators, separating themselves from those oriented mainly to enterprise back-office AI.

The competitive field is broad, spanning global systems integrators, engineering-led specialists, and the technology arms of consulting firms. Leaders in this assessment combined deep O&G expertise with production-scale service delivery, strong data and platform engineering, delivery automation, and responsible AI, cybersecurity, and model governance embedded in operations. Challenges clustered around uneven agentic AI maturity, geographic concentration, front-end consulting posture, and commercial-model flexibility.

For technology leaders, the practical task is to separate firms proven at running AI in production from those strongest at advising on it. This IDC MarketScape is designed to support that judgment, helping O&G IT and business leaders short list providers, weigh delivery model and scale against domain depth, and hold candidates to evidence of scaled, safe, and sustainable AI operations in oil and gas rather than logos or generic AI credentials.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

To be considered in this IDC MarketScape, IDC analysts stipulated that 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 services revenue in the worldwide oil and gas market for calendar year 2025. A minimum revenue threshold is not mandatory.
- The vendor offers a variety of IT services (e.g., systems integration, application development, and business process outsourcing) specific to enabling O&G companies' AI-driven transformation, across at minimum two of the following areas: organization, omni-experience, operating model, information, or leadership, as part of AI-led transformation programs.
- The vendor supports 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 processes such as exploration, production optimization, field development, crude oil transportation, LNG, and refining, were excluded.

- The vendor delivers AI professional 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

- **Separate advising on AI from running it.** Implementation and managed operations are a different discipline from strategy. For scale, weight your selection toward firms with proven production-grade delivery and SLA-backed operations, not only strong advisory credentials.
- **Make data and platform engineering the foundation.** IDC research shows fragmented data and legacy infrastructure, not algorithms, are the main barriers to scale. Prioritize partners strong in data modernization, cloud and platform integration, and AI-ready data foundations.
- **Require edge and IT-OT-ET convergence competence.** O&G value is created at the edge, on platforms, at wells, in pipelines, and in refineries, where latency is a safety issue. Favor providers that can deploy and operate AI at the edge and converge operational and information technology.
- **Evaluate the delivery model and IPs.** Assess IP and accelerators, AI-enabled delivery automation, and the ability to move pilots into production under SLAs. Reusable assets that address most common use cases often beat fully bespoke builds on cost and time to value.
- **Insist on responsible AI, cybersecurity, and model governance in operations.** In safety-critical and regulated O&G environments, governance cannot be an afterthought. Require providers to embed model risk management, security, and responsible AI into the run state, not just the build.
- **Check O&G reference depth and scaled deployments.** Look past logos to evidence of AI deployed and operated at scale in oil and gas, ideally with reference to customers that can speak to reliability, safety, and sustained outcomes.
- **Use this IDC MarketScape to short list and negotiate.** Apply this assessment to short list vendors, evaluate proposals and orals, understand where each provider is genuinely differentiated, and test commercial and delivery model flexibility.

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, this description summarizes each vendor's AI offering in the oil and gas sector, highlighting their main strengths and challenges.

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 professional services for oil and gas companies.

Company overview

Accenture, headquartered in Dublin, Ireland, is a massive professional services company, with a global workforce of hundreds of thousands across more than 120 countries. Its oil and gas business sits within a Resources group and contributes a substantial, multibillion-dollar share of that portfolio. Evidence gathered during the briefing indicates sharp, double-digit year-over-year growth in worldwide O&G AI services revenue.

Accenture serves a large O&G client base with systems integration and application development, which accounts for the majority of its O&G services mix. The company is pivoting that model from FTE-led effort toward platformized, IP-led, and outcome-based delivery, using AI, generative AI, and agentic AI to automate execution and shift a growing share of revenue toward AI-as-a-service and managed constructs. IDC's assessment indicates this pivot is backed by a multiyear, multibillion-dollar data and AI investment. Its O&G client base is huge and spans supermajors, national oil companies, and regional operators across North America, Europe, the Middle East, and the Asia/Pacific.

AI practice for oil and gas industry

Accenture brings roughly 18,000 O&G domain practitioners together with more than 85,000 AI and data professionals, spanning geoscience data management, production operations, midstream pipeline engineering, and asset integrity alongside AI engineers. Delivery is industrialized through AI Refinery, GenWizard, and SynOps, supported by DataXcelerate, which the firm says cuts AI readiness assessment effort by a large margin, and the Accenture Industrial Intelligence Suite, which provides dozens of prebuilt AI solutions across the value chain.

A federated model anchored by AI engineering hubs in Houston; Bengaluru, India; Perth, Australia; and Milan, Italy supports build-operate-transfer, AI-as-a-service, and SLA-backed managed services, with more than 70 live agentic accelerators available for reuse. Evidence gathered during the IDC MarketScape assessment points to more than 6,000 advanced AI

projects delivered across industries in the past fiscal year and to \$5.9 billion in generative AI bookings, giving its O&G services teams a large pool of reusable assets and delivery patterns. It also reports that about 30,000 practitioners have been trained on Anthropic's Claude for best-fit model selection.

Across the value chain, Accenture delivers AI-enabled managed and integration services spanning upstream predictive maintenance and reservoir modeling (using the physics-AI hybrid Cerebra platform), midstream pipeline integrity and capital program optimization, and downstream refining, trading, and retail operations. Production-scale examples include a Middle Eastern national oil company, where an AI control room is live at one gas plant and scaling to several more alongside predictive maintenance across a large drilling program, and a Latin American gas infrastructure operator, where generative AI is live at scale in procurement and IT support. Proprietary platforms extend this footprint, including Cyber.AI (powered by Anthropic's Claude) for IT and OT security convergence, and Signals for downstream fuel and convenience retail. Industrial partners such as Schneider Electric, PDI Technologies, GE Vernova APM, and Baker Hughes Cordant complement its hyperscaler and frontier-model alliances.

Distinctive AI services delivered

Accenture pairs deep O&G operations knowledge with agentic and generative AI to run and optimize services at enterprise scale:

- **Client challenge:** A North American midstream operator needed to control a very large annual capital maintenance program undermined by unverified cost estimates.
AI solution and impact: Accenture built a suite of AI-enabled capital program optimization tools for the operator's pipeline maintenance and permitting, combining predictive risk analytics, permitting automation, capital cost benchmarking, and a generative AI workflow orchestration layer with portfolio and permit risk scoring, including a commercial revenue-at-risk dispatch agent. The tools exposed systemic cost overruns across thousands of permit records spanning dozens of states, with modeled annual savings in the millions of dollars per region.
- **Client challenge:** A global downstream trading business operating across dozens of jurisdictions faced a slow, manual regulatory compliance process.
AI solution and impact: Accenture deployed a generative AI regulatory intelligence and compliance automation capability performing obligation extraction, regulatory document analysis, and policy mapping within a structured compliance workflow across the trading business's multi-jurisdictional environment. It parsed tens of thousands of pages across many jurisdictions and languages, boosting throughput from roughly one regulation every six weeks to dozens per week, achieving a very high acceptance rate from the client's compliance team, and now runs at enterprise scale with ongoing operational support.

Strengths

- **End-to-end transformational delivery capability:** Accenture AI services offering spans strategy, Industry X, systems integration, and managed operations, with a demonstrable track record of enabling oil and gas clients to industrialize AI from pilot to enterprise scale through platforms including AI Refinery, SynOps, and the Industrial Intelligence Suite with its several prebuilt O&G AI models and solutions.
- **Production-scale AI delivery:** Accenture's AI service delivery at scale is evidenced at a Middle Eastern national oil company (control room live and scaling across gas plants; predictive maintenance across a large rig program) and a Latin American gas operator, where Accenture has deployed AI and agentic AI and runs AI-enabled processes as an ongoing managed capability.
- **Customer satisfaction with AI services delivery team:** In IDC's customer reference interviews, oil and gas customers described a highly skilled delivery team with excellent domain expertise and thought leadership drawn from engagements inside and outside the industry and praised the quality of talent on its AI work.

Challenges

- **Premium pricing perception:** Reference customers view Accenture's pricing as high relative to alternatives, even while affirming the spend is justified by the value delivered. Accenture is increasingly countering this with flexible, outcomes-, and value-based commercial models, including agreements where its fee is fully contingent on realized EBITDA or margin improvement. Even so, the premium price perception can remain a hurdle in cost-sensitive procurement where buyers weigh headline rates.
- **Midmarket reach still nascent.** Accenture's AI services are geared toward large-scale enterprise transformation, which can limit fit for the discrete point solutions smaller operators often need. Accenture has moved to close this gap with the June 2026 launch of Accenture Edge, a dedicated midmarket offering (targeting companies with roughly \$300 million to \$3 billion in revenue) with rightsized platforms and partner-led solutions. As a newly launched construct, however, its traction and delivery depth with smaller oil and gas clients remain to be proven.

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 vendor markers in this IDC MarketScape represents IDC Energy Insights' best estimates of the vendor's market share within the specific market segment being assessed (AI services for the worldwide O&G industry).

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

This IDC MarketScape assesses the capabilities and strategies of leading professional services vendors supporting oil and gas companies in their digital journey, leveraging the power of AI to enable intelligent business and operations. This study has a worldwide perspective.

For the purpose of this study, IDC defines AI-driven professional services as the services delivered by IT services providers to help O&G enterprises implement, operationalize, and scale AI across their business and technology environments. These services support

enterprises in embedding AI into enterprise applications, infrastructure, workflows, and service operations to improve efficiency, agility, asset performance, and business outcomes.

AI-driven professional services involve enterprise-wide change requiring innovation across organization (workforce enablement and service delivery models), omni-experience (intelligent user, customer, and employee interactions), operating model (process redesign, automation, and service orchestration), information (data engineering, model enablement, and insight delivery), and leadership (governance, risk management, and execution oversight), as part of AI-led transformation programs.

This study specifically looks at the following vendor service offerings to oil and gas companies: IT services that provide AI-enabling capabilities (including data modernization, cloud and infrastructure services, platform integration, application services, model deployment, and AI operations support) and related implementation and managed services that enable the adoption, scaling, and ongoing performance improvement of AI solutions.

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 presents a vendor assessment of worldwide AI-driven professional services providers for oil and gas companies using 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 professional services 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.

“Oil and gas companies have moved past debating whether AI works to deciding how to run it at the edge, at scale, and safely with guardrails. The professional services firms that industrialize data, integration, and managed operations, and prove they can take AI from pilot to production, will define the next phase of the industry’s digital agenda,” says Gaurav Verma, research director, IDC Energy Insights (Oil and Gas). “As foundation AI models become more capable and widely available, the source of competitive advantage shifts up the stack. In oil and gas, the winners won’t necessarily be the firms with the best AI models — they’ll be the firms that effectively combine AI with deep industry knowledge, proprietary accelerators, integration expertise, and a track record of improving production, reducing downtime, and operating safely.”

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.

IDC Italy

Viale Monza, 14
20127 Milan, Italy
+39.02.28457.1
X: @IDCItaly
idc-insights-community.com
www.idcitalia.com

Copyright and trademark notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit idc.com/about/offices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2026 IDC. Reproduction is forbidden unless authorized. All rights reserved.