IDC MarketScape

IDC MarketScape: Worldwide Digital Service Providers for Large Capital Projects in Energy and Water 2026 Vendor Assessment

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THIS EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Worldwide digital service providers for large capital projects in energy and water vendor assessment



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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 Digital Service Providers for Large Capital Projects in Energy and Water 2026 Vendor Assessment (Doc # US5414192).

IDC OPINION

The energy and water sectors are entering a period in which the volume of capital investment required will vastly outstrip what utilities, grid operators, and water authorities have historically deployed, and the operating models that have governed capital delivery for decades are no longer fit for purpose at this scale. Global energy investment is projected to reach $3.4 trillion in 2026, with electricity-related spending, including end-use electrification, accounting for nearly 60% of that total, and grid investment alone approaching $550 billion (IEA, *World Energy Investment 2026*). Water infrastructure faces an equally fundamental funding challenge, with an estimated $6.7 trillion required globally by 2030 against current annual spending of only around $164 billion (World Resources Group, *Finance for Scale*). These are not abstract totals. They represent tens of thousands of individual capital programs that owners must plan, finance, and deliver within compressed timeframes and against a backdrop of labor shortages, supply chain volatility, and, in several regions, active geopolitical disruption.

The pressure is genuinely global, though its drivers differ by region. Hyperscale and AI-driven datacenter demand is pushing grid and generation buildout in Asia/Pacific to a pace with few historical precedents. In the Middle East, the ongoing conflict is reshaping capital investment priorities toward energy security, infrastructure resilience, and diversification of supply routes, while slowing some investment decisions and raising long-term financing costs (IEA news release, May 2026). This makes the delivery discipline of the programs that do proceed all the more consequential. In Africa, the African Development Bank puts the continent's annual infrastructure investment need at $130 billion to $170 billion against a persistent financing gap of $68 billion to $108 billion (African Development Bank). Even mature markets face the same structural shortfall, which makes clear that the capital gap driving this IDC MarketScape is a global condition rather than a developing market problem alone.

The pressure is also not confined to electricity, since the oil and gas and water sectors covered by this IDC MarketScape face capital programs of comparable complexity. In oil and gas, investment in gas is set to climb to $330 billion in 2026, its highest level in a decade, supported by new liquified natural gas (LNG) projects in the United States and Qatar (IEA, *World Energy Investment 2026*). LNG, offshore, and complex industrial programs of this kind make execution risk, engineering information continuity, contractor coordination, and commissioning readiness particularly consequential. In water, aging infrastructure and multiyear regulated investment programs, such as the asset

management plan (AMP) cycles in the U.K., require owners to standardize delivery across large portfolios of geographically dispersed assets.

The traditional, project-by-project model of capital delivery, in which each program is planned, staffed, and executed largely in isolation from the rest of the portfolio, cannot absorb capital at the volume the energy transition now demands. Cost and schedule overruns have been the norm rather than the exception in large capital programs for decades, and the scale of the coming capital cycle can no longer tolerate that norm. It is imperative that owners move away from planning and delivering capital programs one at a time and toward a model that governs the full portfolio as a connected system.

It is for this reason that IDC Energy Insights considers the emergence of a distinct class of digital service provider, one capable of applying portfolio-level governance, digital twin and lifecycle data integration, IT and OT convergence, and AI-enabled project controls across an owner's entire capital program rather than to individual projects in isolation, to be one of the defining shifts in this market. The imperative is not merely to layer more digital tooling onto existing delivery models. It is to fundamentally restructure how capital programs are governed, funded, and executed, so that owners can move from managing a portfolio of disconnected projects to operating a connected capital system with shared data, standardized delivery patterns, and repeatable execution across the lifecycle.

Compounding this shift is a resource constraint that IDC Energy Insights expects to intensify rather than ease over this IDC MarketScape's evaluation horizon: the competition between grid and network modernization on the one hand and the buildout of new generation, storage, and transmission capacity on the other. Both draw on the same finite pool of capital, skilled engineering labor, and vendor delivery capacity, and renewable generation projects can typically be completed within one to five years while the grid expansions required to connect them often take five to 15 years to plan, permit, and complete (IEA, *Electricity Grids and Secure Energy Transitions*, 2023), a structural lag that compounds the risk of delay and stranded investment where preemptive, portfolio-level planning is not embedded from the outset. Owners that continue to plan modernization and buildout as separate, competing programs will find the resource constraint binding well before the capital constraint does.

It is against this backdrop of unprecedented and geographically dispersed capital demand, chronic underperformance under legacy delivery models, and intensifying competition for finite delivery resources, that IDC Energy Insights has undertaken this evaluation of the digital service providers best positioned to help energy and water owners deliver large capital programs differently. The vendors assessed in this IDC MarketScape are evaluated specifically on their capacity to operate at the portfolio level, to embed digital continuity from planning through operations, and to bring the governance discipline that the coming capital cycle will demand of the entire industry.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

For this IDC MarketScape on digital service providers for large capital projects in energy and water, IDC Energy Insights included firms with an established track record supporting energy and water companies. IDC Energy Insights analysts stipulated that vendors meet the following minimum criteria to be considered in this report:

- **Industry focus:** Vendor must demonstrate an established and dedicated practice serving oil and gas, energy utilities (electricity, gas), and water utilities, and must demonstrate at least three named client references across at least two of these sectors.
- **Service model:** Vendor must provide multilayer service capabilities, including at least three of the following service categories: business consulting, IT consulting, systems integration, application development, and managed services / outsourcing; and must be able to demonstrate end-to-end delivery capability, not limited to advisory or staff augmentation.
- **Capital project coverage:** Vendor must demonstrate capabilities in at least five of the following seven domains: capital portfolio planning, project controls, engineering data / digital thread, construction and commissioning digitalization, IT/OT integration, advanced analytics/AI/digital twins, and platform implementation and managed services; and must be able to provide at least one reference or case example per claimed domain.
- **Enterprise-level delivery:** Vendor must demonstrate experience supporting multiproject or portfolio-level programs, engagements involving multiple assets, sites, or projects, or enterprise-wide platforms or processes, and must be able to demonstrate at least two engagements that span multiple projects or business units and include standardization or integration across projects.
- **Platform and systems integration:** Vendor must be able to demonstrate implementation and/or integration experience with at least three of the following platform categories: enterprise portfolio and project management (EPPM), asset performance management/enterprise asset management (APM/EAM), asset lifecycle management (ALM), geographic information system (GIS), data/cloud platforms, and engineering tools (including PLM where relevant); and must be able to demonstrate integration across at least two platform categories within the same engagement.
- **Global delivery scale:** Vendor must be able to demonstrate active delivery in at least three regions (Europe, Asia, Oceania, Africa, Middle East, North America, Central America, and South America), the ability to deploy multicountry programs or support globally distributed delivery teams, and a minimum of one large-scale program (>100 FTE or equivalent complexity).
- **Capital project track record:** Vendor must be able to demonstrate experience in large and complex capital programs, including multiyear duration or

multiasset/multisite scope, and at least one engagement supporting a capital program of approximately $500 million or more.

- **Digital and data capabilities:** Vendor must demonstrate capabilities in at least two of the following: advanced analytics, AI/ML, digital twins, and data platforms/integration layers. They must also be able to show application to capital project use cases, not generic AI capability.

ADVICE FOR TECHNOLOGY BUYERS

In this IDC MarketScape on digital service providers for large capital projects in energy and water, IDC Energy Insights assessed various offerings from international and global digital service providers. Energy and water companies should use this IDC MarketScape to:

- Get a first independent assessment of digital service providers' capabilities
- Integrate a list of companies from which they might request proposals
- Leverage criteria in their individual selection evaluation processes

When addressing large capital projects in energy and water, companies should consider the following:

- **Establish whether the mandate is single-project delivery or portfolio-level governance before evaluating vendors.** A capability proven at the level of one program, however large, does not automatically transfer to the discipline of governing capital allocation, standardization, and risk across a multiproject portfolio. The reverse holds equally true for firms whose depth sits in enterprise governance rather than hands-on project execution. Buyers should state, in the RFI and in vendor briefings, which of the two mandates they are evaluating. The evidence to request from vendors, and the internal stakeholders best placed to assess it, differ materially depending on the mandate. Buyers primarily seeking single-project execution should not read this IDC MarketScape as an assessment of that capability, since it evaluates providers of enterprise and portfolio-level digital enablement rather than engineering, procurement, and construction (EPC) or project delivery firms.
- **Look past heritage labels and weight engineering information capability alongside IT and advisory pedigree.** The traditional distinction between systems integrators, engineering-led specialists, and management consultancies has narrowed considerably. Vendors increasingly compete for the same capital-delivery mandates regardless of where their brand originated. Buyers should specifically probe engineering depth, meaning the ability to digitalize, integrate, govern, and maintain engineering information and workflows across the project lifecycle, and to operate credibly alongside owner engineers and EPC contractors. This does not extend to performing physical design or construction engineering, which falls outside the scope of this IDC MarketScape. Engineering depth in this

sense is often underweighted when evaluation defaults to a vendor's historical category, and it is frequently where the most consequential delivery risk sits.

- **Test how the provider establishes digital continuity, data ownership, and interoperability across the capital program lifecycle.** Large capital programs run across fragmented ecosystems, which typically span EPPM, ERP, engineering and building information modeling (BIM) tools, GIS, construction management, EAM/asset performance management (APM), and operational systems. The ability to integrate these environments proved to be an important consideration in this evaluation. Buyers should ask vendors to demonstrate a consistent information model and digital thread from planning and engineering through commissioning and operations. They should also establish how data ownership, engineering standards, and interfaces are maintained across platforms and contractors. Additionally, buyers should confirm that information remains usable after the implementation partner exits. Dependence on integration layers or project-specific solutions that only the provider can maintain should be treated as a risk. This matters most for owners running multiple capital programs over decades, where the continuity of data outlasts any single contract.
- **Demand references calibrated to similarity of scale and scope.** Given how concentrated genuine large-capital-project experience remains among a relatively small set of vendors globally, it is difficult to expect a reference identical in geography, asset type, and value chain position to the program under consideration. Buyers should instead ask for references comparable in program scale, geographic complexity, and breadth across the capital-project value chain, from early engineering through commissioning, and they should treat a vendor's willingness to be transparent about where the comparison is imperfect as itself a signal of credibility.
- **Weigh the partnership model as heavily as the range of services on offer and test it through references rather than proposals.** Large capital programs run for years, and something will invariably go wrong along the way, whether a scope change, a supply disruption, or a technical surprise buried in legacy data. What distinguishes a strong delivery partner is not the absence of such moments but how the service provider has behaved inside them. Contractual change is not in itself a sign of a weak partnership, since formal change control is a normal part of programs of this size. What matters is how changes, disputes, risks, and accountability were managed, and whether the relationship worked toward a solution rather than defaulting to positional renegotiation. This is difficult to extract from a written proposal. Buyers should therefore structure reference calls explicitly around a past program that encountered difficulty and should press for how the vendor responded rather than accept a generic assurance of partnership.
- **Prioritize service providers who propose redesigning the workflow, not merely digitizing the one already in place, and who can be held accountable for measurable outcomes.** Many legacy capital-delivery processes were built before the current generation of data, analytics, and AI tools existed. Simply

layering software onto an unchanged process forecloses much of the value those tools can unlock. Buyers should favor vendors who can articulate, concretely, how a workflow such as portfolio-level scheduling, cross-project data governance or field progress reporting would be run differently given today's tools, rather than service providers who describe automating the existing steps. A redesigned operating model should also be verifiable. Buyers should ask vendors to demonstrate improvements against baselined KPIs, such as schedule predictability, cost variance, change-order management, project readiness, engineering-data quality, and handover efficiency. Additionally, buyers should examine how responsibilities and commercial incentives are structured, particularly where several technology providers, consultants, and EPC contractors share delivery responsibility.

- **Test AI and innovation claims against evidence of production use, not roadmap ambition.** AI and digital-twin capability are now claimed almost universally across this service provider set, but the maturity behind that claim varies considerably, and it is common for a capability to be presented as available when it has, in practice, run once or twice rather than repeatedly across programs of comparable scale. Buyers should ask directly how many times a given capability has been deployed in production, on programs resembling their own, and in which release or version. They should treat a service provider's candor about where a capability remains in pilot as more useful than an unqualified claim of readiness.

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 of this 2026 IDC MarketScape on worldwide digital service providers for large capital projects in energy and water.

Accenture has served energy and water clients for four decades, three of them focused specifically on digital services for large capital projects. That experience now operates within Accenture Construct, a global business launched in September 2026 to unify advisory, engineering, delivery, and technology services. The unit is organized around five lines aligned to asset type rather than delivery discipline: datacenters; utilities and telecommunications, which includes water; transportation and civil infrastructure; advanced manufacturing; and process industries, which includes energy and oil and gas. More than 5,000 practitioners are dedicated specifically to digital services for large capital.

Within this structure, Accenture delivers across the full capital lifecycle, from early portfolio planning, feasibility, and operating-model design through detailed engineering, program and cost controls, construction management, and commissioning. Delivery combines long-standing advisory and technology staff with engineering and project-controls personnel added through acquisition, enabling Accenture to field its own teams for construction management, permitting, and quality, health, safety, and environment (QHSE) rather than only advise on them.

Three internally developed digital assets reinforce this integrated delivery model: Control Tower, a capital-projects platform owned outright that normalizes disparate project coding structures into a single analytics layer and lets users generate custom metrics and Primavera-integrated schedule scenarios through natural-language prompts rather than dashboard configuration; Connected Construction, a companion platform providing real-time field planning and execution tracking; and a multiagent readiness tool that scores stage-gate documentation against several thousand automated checks, with human review and adjustment of the resulting scores.

Delivery blends geographic hubs, including a consolidated southern European hub, North American capability, and delivery centers in India and the Philippines, alongside specialist acquisitions such as BOSLAN, IQT Group, Anser Advisory, Comtech Group, Soben, Fibermind, Verum Partners, and Avicado. Early-stage advisory is available on milestone- and fees-at-risk terms through Partners in Performance, helping clients reach a fundable investment decision before capital is committed. A majority-owned joint venture with DLB Associates serves U.S.-based datacenter clients across the full facility lifecycle.

Accenture also operates at enterprise portfolio scale rather than only at the individual-project level, with a substantial base of ongoing managed-service engagements and portfolio-level programs spanning project controls, enterprise project and portfolio management, data integration, and project-to-operations handover.

Accenture’s ecosystem reflects three decades of platform alliances that predate most of its recent acquisitions, rather than a single anchor system it built or bought outright. It served as Oracle’s original global systems integrator for Primavera, with the alliance also spanning Unifier, OPC, and Aconex, and it holds long-standing alliances with SAP, AVEVA, and Octave (formerly Hexagon), spanning design, project execution, and asset-information platforms. Alliances with Microsoft, AWS, Google Cloud, Palantir, OpenAI, and Anthropic extend this into agentic AI, cloud data, and simulation. Active startup engagement includes innovators such as Alice Technologies and Cintoo, and recent acquisitions and partnerships have extended this technology ecosystem to include Procore, Autodesk, and Kahua.

On AI, Accenture separates capability it owns outright, such as Control Tower, from capability co-developed and co-funded with clients, and from capability sourced through hyperscaler and model partnerships. Closed-loop autonomous action is largely confined to low-risk domains such as document control; in scheduling, agents draw on Alice

Technologies and AIP for scenario planning and simulation to re-optimize a plan against cost or time constraints and regenerate it directly within the client's scheduling environment, though a person still selects the resulting scenario. A separate generative-design capability pairs large-language-model extraction of engineering documents with a constraint-based optimization engine to produce early-stage facility-layout drafts, followed by a short human refinement cycle.

Accenture typically sits at the center of a client's project-controls and engineering-to-operations architecture, consolidating disconnected source systems and connecting engineering design tools to downstream cost, schedule, and asset systems. Delivery experience spans energy, water, and adjacent sectors globally, with the active in-scope client base concentrated most heavily in Europe and North America, and in energy utilities, followed by oil and gas, spanning upstream offshore engineering, midstream LNG, and downstream refining and petrochemicals, and water utilities. The most concrete forward direction is extending the Control Tower architecture into a broader Digital Brain platform that standardizes project data under a shared ontology, intended to let reusable AI agents operate across a wider range of project-controls functions than the scheduling optioneering already in production today.

Strengths

- Advisory, owner's engineering, project controls, enterprise technology implementation, and managed services sit inside one accountable structure under Accenture Construct, a global business newly launched to unify these capabilities, reinforced by a decade-plus acquisition program and an extensive set of platform alliances built over that period.
- Program leadership operates at a senior, strategic level rather than being confined to delivery execution, pairing structured governance and proactive risk management with a direct escalation path that resolves staffing-fit or delivery problems without a formal change process. Delivery itself flexes scope and resourcing within a fixed cost and timeline envelope, including agile, program-increment-based cycles that absorb scope changes without commercial change orders and have the capacity to scale team size as project demand increases.

Challenges

- Organizational change and adoption support leans toward a standardized, consultancy-style methodology rather than one tailored to the client organization's specific culture and maturity level, a gap that becomes more visible on ground-up program builds where adoption of new tools and ways of working are still maturing.
- Continuity of operational and delivery-team staff, unlike senior program leadership, and the transfer of institutional knowledge between rotating team members remain areas needing reinforcement, alongside a ramp-up period during which incoming staff build fluency in a client's specific procedures before reaching full effectiveness.

Consider Accenture when

Consider Accenture when an energy or water capital-project owner needs a single, accountable partner spanning strategy, owner's engineering, project controls, and technology delivery for large, multiyear programs, particularly where data fragmented across disconnected engineering, cost, and scheduling systems is undermining portfolio visibility.

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 relative bubble sizes represent each vendor's market footprint, based on estimated worldwide annual revenues attributable to in-scope digital services for large capital projects in energy and water.

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 evaluates global digital service providers that enable energy and water companies (including utilities and oil and gas operators) to digitally plan, manage,

and optimize large capital project portfolios and lifecycle processes, with a primary focus on portfolio-level governance and cross-project standardization rather than single-project delivery.

These providers deliver enterprise-level digital capabilities and services that span the capital project lifecycle, from planning and design through engineering, construction, commissioning, and operations, supporting functions such as portfolio planning and capital allocation, project controls and execution management, engineering data management and digital continuity, IT/OT integration across project and asset environments, and advanced analytics, AI, and digital twins for project performance.

Unlike EPC or engineering firms, these providers do not primarily execute physical projects; instead, they deliver IT, digital, and consulting services that enable project execution, operate at the level of enterprise functions and cross-project capabilities, support repeatable, scalable digital operating models across capital project portfolios; they do not primarily provide standalone software platforms as their core offering.

These capabilities are increasingly critical as energy and water companies seek to improve capital efficiency, manage project complexity, and ensure consistency across large, multiyear investment programs through data-driven and digitally enabled approaches.

The vendors covered in this IDC MarketScape are positioned as providers of the digital enablement layer for capital project management, characterized by acting as the system of enablement that provides the digital capabilities and integration layer supporting project planning and execution (rather than being the core transactional systems themselves), operating at an enterprise and portfolio level to enable coordination, standardization, and optimization across multiple projects (rather than focusing on single-project delivery), and delivering the digital and data layer that supports capital project execution (rather than performing physical engineering, procurement or construction activities directly).

This IDC MarketScape, which has a worldwide perspective, assesses vendors that can support multiple enterprise-level capital project functions, including:

- Capital portfolio planning & governance: investment planning, prioritization, and scenario modeling, and capital allocation and financial optimization
- Project controls & execution management: cost, schedule, risk, and performance management, and integrated project controls platforms
- Engineering data & digital thread: integration of engineering, asset, and project data, and digital continuity across the lifecycle (design to operations)
- Construction & commissioning digitalization: digital site management, field data capture, and progress tracking, and integration with contractors and execution ecosystems

- IT/OT integration for capital projects: integration of project systems with asset, grid or plant systems, and data flows between engineering, operations, and enterprise IT
- Advanced analytics, AI, and digital twins: predictive project analytics, simulation and scenario modeling, and digital twins for project and asset lifecycle
- Platform implementation & managed services: deployment and integration of project systems (e.g., APM, EPPM, PLM), and ongoing operations, support, and optimization

Explicit boundaries include:

- Excluded: EPC/Engineering firms, meaning firms primarily delivering design, engineering, procurement, and construction, or project-specific execution without reusable digital platforms. An exception applies only if they have a scaled IT/digital services business.
- Excluded: Software/Platform vendors, meaning pure-play providers of EPPM, APM, PLM, BIM, and others. They are included only if paired with large-scale services delivery capability.
- Excluded: Project-level services only, meaning one-off digitalization projects with no enterprise-wide or portfolio-level capabilities.

LEARN MORE

Related research

- *IDC FutureScape: Energy and Resources 2027 Predictions* (IDC #US54982426, October 2026)
- *IDC Survey: How Water Utilities Are Prioritizing IT Solution Investments — Insights from IDC's 2026 Energy & Utilities Industry-Specific Tech and Innovation Survey* (IDC #EUR154574326, June 2026)
- *IDC Survey: From Generation to Grid: How Power and T&D Utilities Are Setting Their Strategic Priorities — Insights from IDC's 2026 Energy and Utilities Industry-Specific Tech and Innovation Survey* (IDC #US53424726, May 2026)
- *Datacenters: A Stress Test for Utility Strategy from Grid Constraint to System Redesign in the AI Era* (IDC #EUR154421926, March 2026)
- *IDC PeerScape: Best Practices for Datacenter Decarbonization and Grid Integration* (IDC #US52798625, February 2026)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2026: Energy as a Service* (IDC #EUR154223026, February 2026)
- *IDC MarketScape: Worldwide Utilities Asset Performance Management 2025–2026 Vendor Assessment* (IDC #US53008225, November 2025)
- *IDC FutureScape: Worldwide Utilities 2026 Predictions* (IDC #US53857825, October 2025)

- *IDC MarketScape: Worldwide Energy Transition Professional Services 2025 Vendor Assessment* (IDC #US52984025, August 2025)
- *New U.S. Energy Policies and Their Impact on Clean Energy Projects* (IDC #US53693125, August 2025)
- *IDC MarketScape: Worldwide Service Providers for Power Generation and Storage 2025 Vendor Assessment* (IDC #US52038625, March 2025)

Synopsis

This IDC study evaluates digital service providers supporting large capital projects in energy and water worldwide. It analyzes vendors' capabilities, strategies, and positioning in a market undergoing structural transformation as owners face a capital investment cycle that outstrips the capacity of traditional, project-by-project delivery models and move toward governing capital programs as connected portfolios. The report provides energy and water companies with a structured framework to assess service providers across capital portfolio planning, project controls, engineering data and digital thread, construction and commissioning digitalization, IT/OT integration, advanced analytics, AI, and digital twins, and platform implementation and managed services.

"The volume of capital that energy and water owners must now deploy is so vast that the operating model behind large capital projects for the past several decades is simply no longer viable, and no amount of incremental effort will make delivering one program at a time scale to the size of this investment cycle. Owners need service providers capable of restructuring how capital is governed, funded, and executed across the entire portfolio, with shared data, standardized delivery patterns, and AI proven in production, because the old way of delivering large capital projects will not survive the demands now being placed on it." — Research Director Gaia Gallotti, 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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