



## IDC MARKETSCAPE

# IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2016 Vendor Assessment

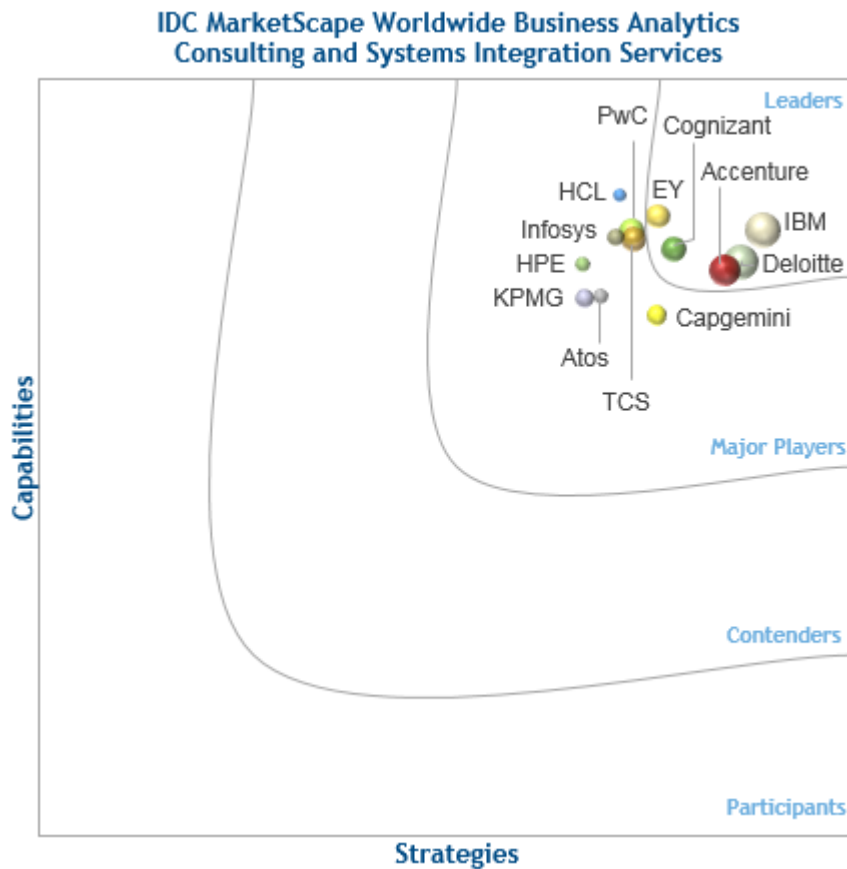
Ali Zaidi

THIS IDC MARKETSCAPE EXCERPT FEATURES IBM

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Business Analytics Consulting and Systems Integration Services Vendor Assessment



Source: IDC, 2016

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

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2016 Vendor Assessment (Doc #US40150316). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

## IDC OPINION

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This IDC study represents a vendor assessment of the 2016 business analytics consulting and systems integration (C&SI) services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's success in the marketplace and help anticipate its ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide business analytics C&SI services market. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing business analytics C&SI services in both the short term and the long term. A significant component of this evaluation is the inclusion of the perception of business analytics C&SI services buyers of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC's macroregions. Key findings include:

- Across all 12 strategies assessed by IDC, the top 3 strategies with the highest aggregated scores across all business analytics C&SI service providers were "functionality/offering road map strategy," "financial/funding management strategy," and "customer service strategy." The strategy that received the lowest aggregated score overall was the "growth strategy."
- Based on the survey feedback from 86 of the evaluated vendors' customers, the subcategories "cost management" and "customer service" received the highest aggregate scores. The lowest aggregate score for any subcategory was for "functionality/offering delivered."
- When buyers were asked what characteristics were required for a business analytics C&SI services project to be successful at a worldwide level, the top 2 characteristics were "achieve desired business outcomes" and "clean, consolidate, and manage business data in a timely manner."

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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This research includes analysis of the 13 major business analytics C&SI services providers with broad portfolios spanning IDC's research coverage and with global scale. This assessment is designed to evaluate the characteristics of each firm – as opposed to its size or the breadth of its services. The inclusion criteria dictates at least \$300 million revenue coming from a vendor's business analytics C&SI services practice at a worldwide level as well as a minimum of 2,250 business analytics C&SI services-associated global resources; furthermore, at least 10% of revenue and 10% of head count needs to be located in each macroregion. In addition, it is conceivable, and in fact the case, that specialty firms can compete with multidisciplinary firms on an equal footing. As such, this evaluation should not be considered a "final judgment" on the firms to consider for a particular project. An

enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for an engagement.

## ESSENTIAL BUYER GUIDANCE

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- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool not only to short list vendors for business analytics C&SI services bids but also to evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise, industry based or otherwise.'
- **Customer service and cost management.** Include vendor performance on these factors among your highest selection criteria. These were the top 2 in terms of importance for project success as rated by customers that were surveyed for this IDC MarketScape.
- **Business outcome and data management.** Select services partners for your business analytics C&SI services engagements that have strong data management capability and ability to help businesses achieve desired business outcome. Successful organizations carried out business analytics C&SI services projects by partnering with business analytics C&SI services providers that helped them achieve the desired business outcome they were looking for. It is essential that the investments you put in business analytics solutions drive the business outcomes they are planned to achieve and therefore it will be highly beneficial to partner with a provider that has a reputation to help you achieve these outcomes. Successful organizations also carried out business analytics C&SI services projects by partnering with business analytics C&SI services providers that helped them clean, consolidate, and manage business data in a timely manner. Having a robust and right master data management is the backbone of any successful business analytics initiative. Select a partner that can showcase the capability to create the most suitable data management solutions for your needs.

## VENDOR SUMMARY PROFILES

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

### IBM

According to IDC analysis and buyer perception, IBM is an IDC MarketScape Business Analytics C&SI Services Leader worldwide.

IBM is one of the largest consulting firms globally, serving clients in more than 450 locations across 170 countries. IBM Global Services helps clients along their digital and cognitive transformation journeys, with analytics and experience design at the heart of IBM's capabilities. IBM Interactive Experience (iX), one of the world's largest global digital design agency, leads the strategy and design aspects of client engagements, while the 20,000 consultant-based analytics and cognitive consulting practice helps clients realize value and transformation from their technology investments. IBM's partnerships with Apple, Twitter, Facebook, Box, and The Weather Company further add capabilities beyond IBM's traditional focus areas.

## Strengths

Buyers rate IBM highly for handling changes in project scope, providing industry insights and competence, and helping achieve desired business outcomes. IDC rates IBM highly in terms of its pricing model strategy and its customer services strategy.

## Challenges

IDC believes IBM's cost management strategy could be enhanced by offering more ways to help clients justify the investment they are putting on analytics initiatives. IBM's next-generation tools and methods could be enhanced with more data-based applied research.

## Opportunities

According to IDC's 2016 *Global Business Analytics C&SI Services Buyer Perception Survey*, IBM can further enhance its position in future related IDC MarketScape evaluations by improving its client perception in the following areas:

- Apply proven methodologies/tools (horizontal- and vertical-specific integration accelerators and templates)
- Provide strong change management processes
- Minimize clients' administrative cost for vendor management

## APPENDIX

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### 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 represent 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 a review board 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.

*Note: All numbers in this document may not be exact due to rounding.*

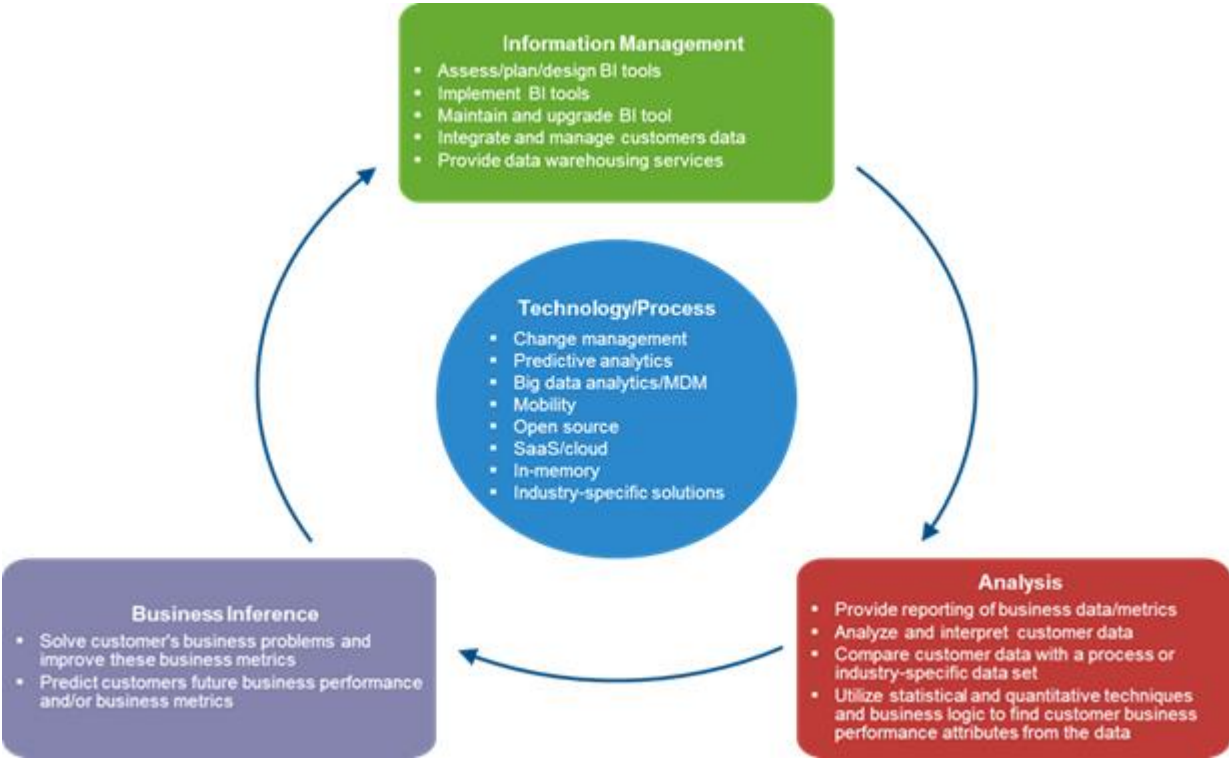
### Market Definition

IDC believes the business analytics services value chain is made up of the following three pillars or areas: information management, analysis, and business inference. At the same time, a certain set of processes and technologies need to be delivered across these three areas. IDC believes the coupling of these processes and technologies with the previously mentioned areas defines the complete value chain of business analytics services (see Figure 2). For a detailed definition of the business analytics services illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2015* (IDC #254824, March 2015).

This IDC MarketScope provides vendor assessment with regard to the advisory, assessment, plan, design, and build phases of the business analytics services value chain.

**FIGURE 2**

### IDC's Business Analytics Services Value Chain



Source: IDC, 2016

## LEARN MORE

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### Related Research

- *Worldwide Business Analytics Services Forecast, 2015-2019* (IDC #US40549515, November 2015)
- *IDC MarketScape: Worldwide Business Analytics Consulting and Systems Integration Services 2014 Vendor Assessment* (IDC #248172, May 2014)

### Synopsis

This IDC study represents a vendor assessment of the business analytics consulting and systems integration services through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the business analytics consulting and systems integration services market. This IDC MarketScape covers a variety of vendors participating in the business analytics consulting and systems integration services space. 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 the most influential for success in the market in both the short term and the long term.

"The advent of new analytics areas such as cognitive computing and IoT, proliferation of new technologies and data sources, and pervasiveness of areas such as big data and advanced analytics continues to drive rapid demand for business analytics solutions. Services providers that can rapidly innovate solutions around new and emerging areas while keeping the focus on established segments of business analytics will enjoy high growth in the near future," says Ali Zaidi, research director, IT Consulting and Systems Integration Business Strategies at IDC.

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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