

# IDC MarketScape: Worldwide Microsoft Implementation Services 2021 Vendor Assessment

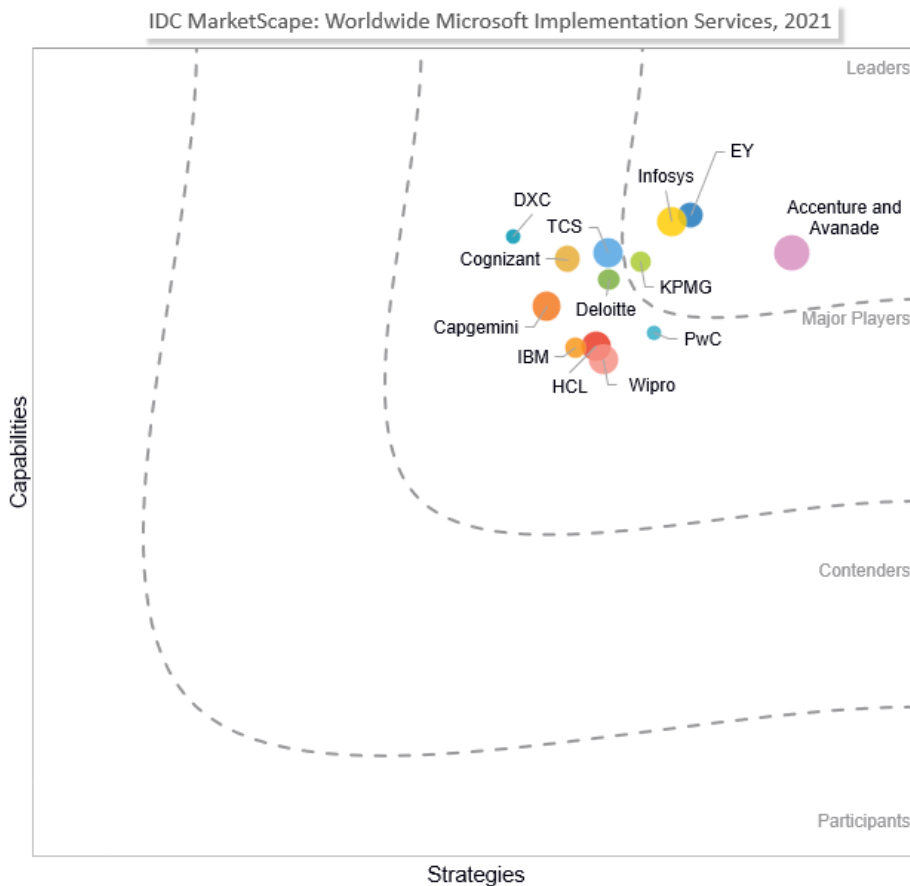
Ali Zaidi

THIS IDC MARKETSCAPE EXCERPT FEATURES AVANADE

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Microsoft Implementation Services Vendor Assessment



Source: IDC, 2021

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: Worldwide Microsoft Implementation Services 2021 Vendor Assessment (Doc # US46733621). 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 2021 Microsoft implementation 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 Microsoft implementation services market. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing Microsoft implementation services in both the short term and the long term. A component of this evaluation is the inclusion of the perception of Microsoft implementation 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 from the evaluation include the following:

- Across all 14 strategies assessed, the 3 strategies area rated most highly by customers are "portfolio strategy," "functionality/offering strategy," and "client adoption strategy."
- The 3 areas of key capabilities highly rated on average by customers are "employee management," "customer service delivery," and "delivery model appropriateness and execution."
- Based on IDC's *Global Microsoft Implementation Services Buyer Perception Survey* feedback from 66 of the evaluated vendors' customers, the most critical business priority for them was to "improve operational efficiency," while the most critical vendor attribute for successful Microsoft implementation services was being "able to achieve desired business outcomes."
- Enterprises are undertaking managed services and custom application on Microsoft platforms when adopting in addition to implementing Microsoft solutions. IDC's *Global Microsoft Implementation Services Buyer Perception Survey* suggests that, in over 30% of the Microsoft implementation projects, customers are also outsourcing the day-to-day management and support of their Microsoft systems. At the same time, enterprises are creating custom solutions to handle specific business/IT needs. In the same survey, buyers indicated that about 29% of Microsoft implementation services projects involve custom application development on various Microsoft platforms.

## IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

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This research includes an analysis of 13 Microsoft applications systems integrators (SIs) 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 also dictate at least \$275 million in revenue coming from a vendor's Microsoft implementation services practice at a worldwide level, as well as a minimum of 2,700 Microsoft implementation-associated global resources, and at least 10% of the vendor's worldwide Microsoft revenue and head count should come from each of IDC's macroregions.

## ADVICE FOR TECHNOLOGY BUYERS

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- **Value-driven investment.** While cost of implementation services is an important element when considering investment in Microsoft technologies, make sure that cost is worth the value it generates. IDC research indicates that customers adopting Microsoft solutions deem the project's ability to deliver the right value for the price paid for implementation services to be the second most critical success factor of the implementation project, behind only to achieving business outcome. When comparing cost of implementation services, make sure to align the cost to the desired value you are trying to achieve. Define the end goals the project should help you achieve, and the price for the implemented project should reflect to what extent the project will be able to achieve the target goals.
- **Co-innovation.** One of the major hurdles in successfully adopting new technologies is formulating the appropriate use cases that will result in achieving the optimal benefits from the technologies. While adopting new technologies, select implementation partners that are willing to cocreate use cases that will map the technology benefits with your business outcomes and goals. The right uses cases will help get alignment with internal stakeholders' needs and will provide the maximum benefits from the technologies being consumed.
- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list vendors for Microsoft implementation services bids but also evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise – technical, industry based, or otherwise.

## 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 each vendor's strengths and challenges.

### Accenture and Avanade

According to IDC analysis and buyer perception, Accenture and Avanade is positioned in the Leaders category in the 2021 IDC MarketScape for Microsoft implementation services worldwide.

Accenture, Avanade, and Microsoft help clients formulate new strategies and industry solutions to drive innovation and growth in the digital era. The Accenture Microsoft Business Group – launched in February 2019 – elevates the long-standing Accenture, Avanade, and Microsoft relationship, expanding combined service capabilities, global scale, and joint solution development to help clients overcome disruption and lead transformation in their industries. This represents the largest partner investment in the Microsoft ecosystem to date. Building on the success of Avanade, the group brings together more than 45,000 dedicated professionals – the largest group of Microsoft solution experts in the world. With new joint products and services built on the Microsoft cloud, clients can engage customers in new ways, empower employees, reimagine operations, and invent new products and services. Accenture and the strategic partnership between Avanade and Microsoft help clients such as the Government of India, Carlsberg, and U.K.'s National Health Service offer better solutions to their own clients.

## Strengths

Buyers rate Accenture highly for the company's ability to integrate its team with customers' internal teams and for its ability to meet the project timeline and handle changes in project scope. Similarly, IDC views Accenture highly in terms of its growth strategy and its innovation/R&D strategy.

## Challenges

IDC believes Accenture's customer service strategy could be improved by utilizing an independent third party to the company's customer feedback collection process. Also, Accenture would benefit from offering customers self-service buying options for implementation services.

## 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 represents the market share of each individual vendor within the specific market segment being assessed.

### IDC MarketScape Methodology

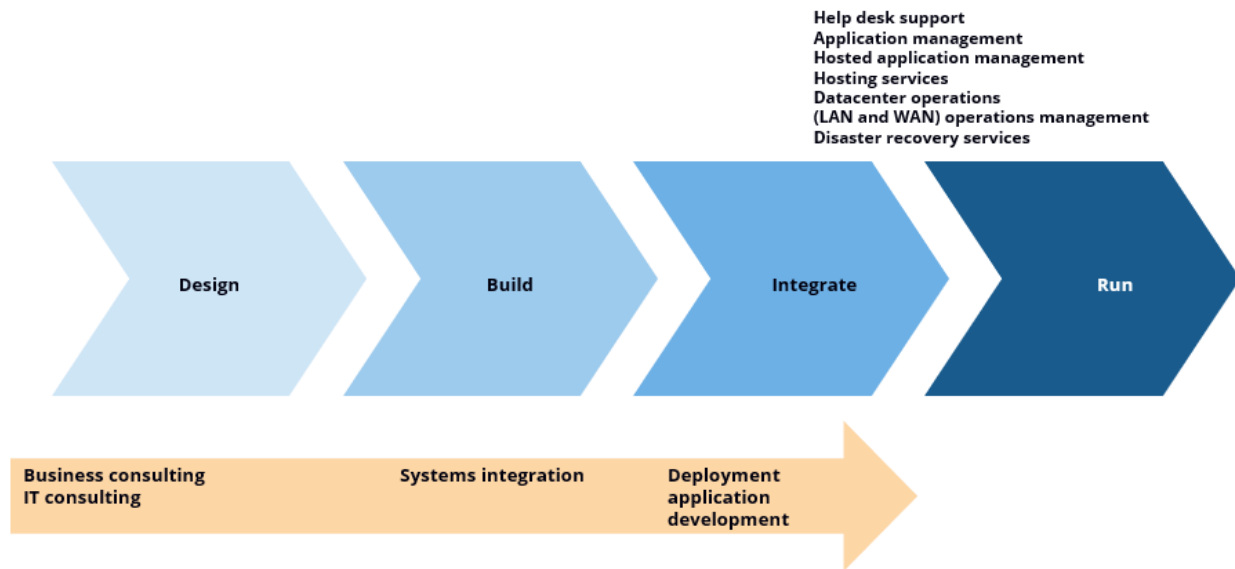
IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, 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

The Microsoft implementation services market covers the design, build, and integrate functions of the design-build-run function chain (see Figure 2). The design phase includes both IT and business consulting. For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019).

**FIGURE 2**

**IDC's Design-Build-Run Function Chain**



Source: IDC, 2021

***Customer Perceptions of Microsoft Implementation Services Vendors***

A significant and unique component of this evaluation is the inclusion of the perceptions of Microsoft implementation services' buyers of both the key characteristics and the capabilities of the vendors evaluated. The buyers participating in IDC's *Global Microsoft Implementation Services Buyer Perception Survey* have partnered with at least one of the participating vendors directly on a Microsoft implementation project within their company. The survey findings highlight key areas where buyers expect Microsoft implementation services providers to showcase a range of capabilities. The buyers consider these capabilities a must-have for Microsoft implementation services to be able to fulfill the requirements of many business and IT issues that challenge the buyers.

Figure 3 illustrates the top 10 business drivers for Microsoft implementation services projects for the Microsoft services customers surveyed in 2021. Customers cited improving operational efficiency and creating a more effective business that caters to changing customer needs as the top 2 business drivers for taking on Microsoft implementation services.

**FIGURE 3**

**Top 10 Business Drivers for Microsoft Implementation Services Projects, 2021**

Q. How important a business priority do you believe each of the following is currently for your company?



n = 66

Note: Mean scores are based on a scale of 1-5, where 1 = not a priority and 5 = a critical business priority.

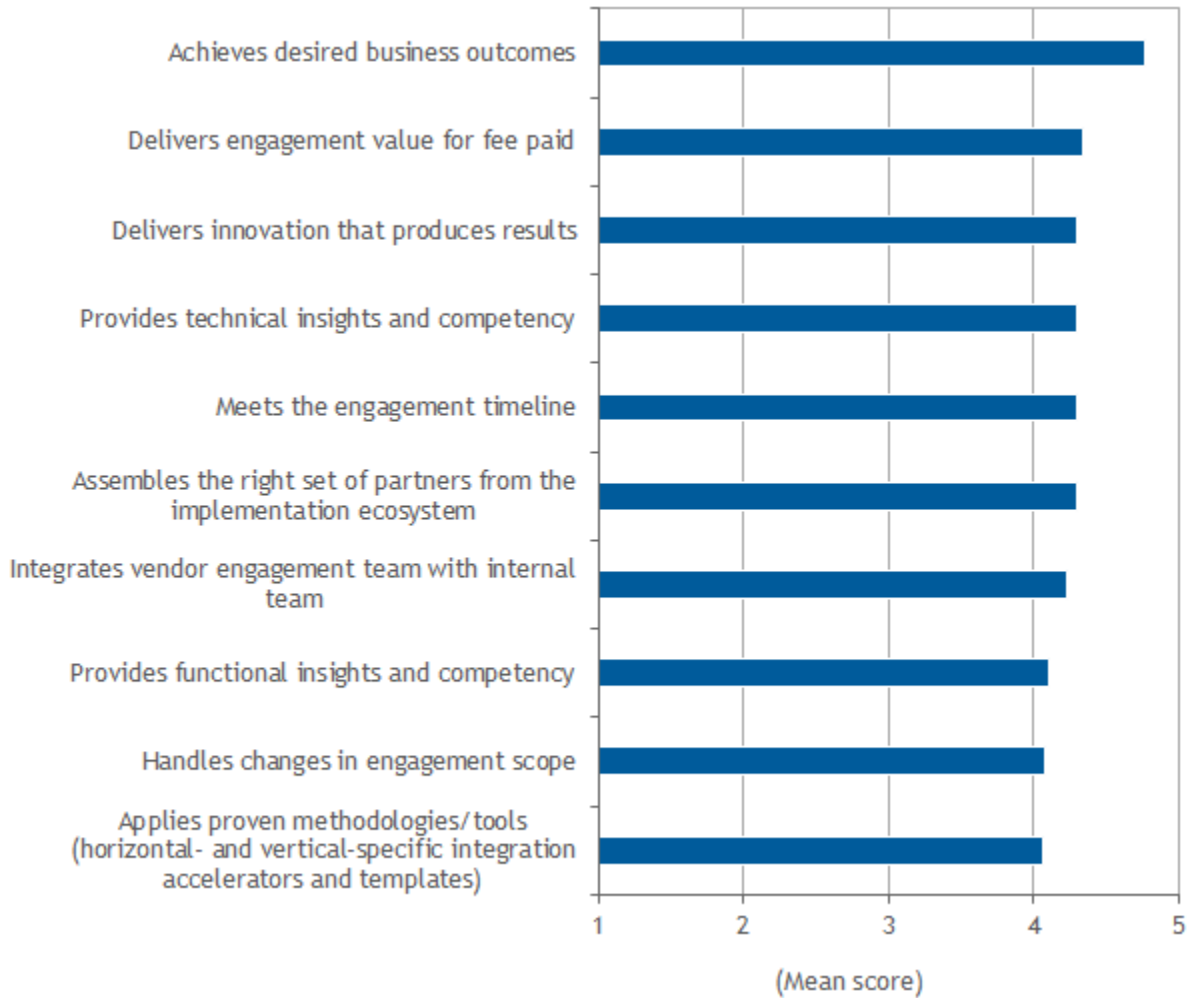
Source: IDC's *Global Microsoft Implementation Services Buyer Perception Survey, 2021*

Figure 4 illustrates the rank order of factors that are important for a successful Microsoft implementation services project for the Microsoft services customers surveyed in 2021. Survey findings suggest that the ability to achieve desired business outcomes by the consultants working on a Microsoft implementation services project is the most critical factor for the successful completion of the project. Customers also indicated the project's ability to deliver the right value for the cost of the project to be one of the most critical attributes for a project's success.

## FIGURE 4

### Top 10 Important Factors for Successful Microsoft Implementation Services Projects, 2021

Q. In order for a Microsoft implementation services engagement to be successful, please indicate the importance of each of the following characteristics.



n = 66

Note: Mean scores are based on a scale of 1-5, where 1 = not essential and 5 = essential to success.

Source: IDC's *Global Microsoft Implementation Services Buyer Perception Survey, 2021*

## LEARN MORE

### Related Research

- *Worldwide and U.S. Systems Integration Services Forecast, 2020-2024* (IDC #US45198620, May 2020)

- *IDC MarketScape: Worldwide Microsoft Implementation Services 2019 Vendor Assessment* (IDC #US45034818, May 2019)
- *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019)

## Synopsis

This IDC study represents a vendor assessment of the Microsoft implementation services ecosystem through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the Microsoft implementation services market. This IDC MarketScape covers a variety of vendors participating in the Microsoft implementation 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.

"Customers are adopting Microsoft technologies to not only improve efficiencies in business and IT operations but create more effective businesses to be able to cater to changing customer needs. Services vendors that develop solutions enabled by Microsoft technologies that cater to these two critical business priorities as well as have an end-to-end cloud application and infrastructure services portfolio will see success in the Microsoft ecosystem 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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