



IDC MarketScape

IDC MarketScape: Worldwide Microsoft Implementation Services 2017 Vendor Assessment

Gard Little

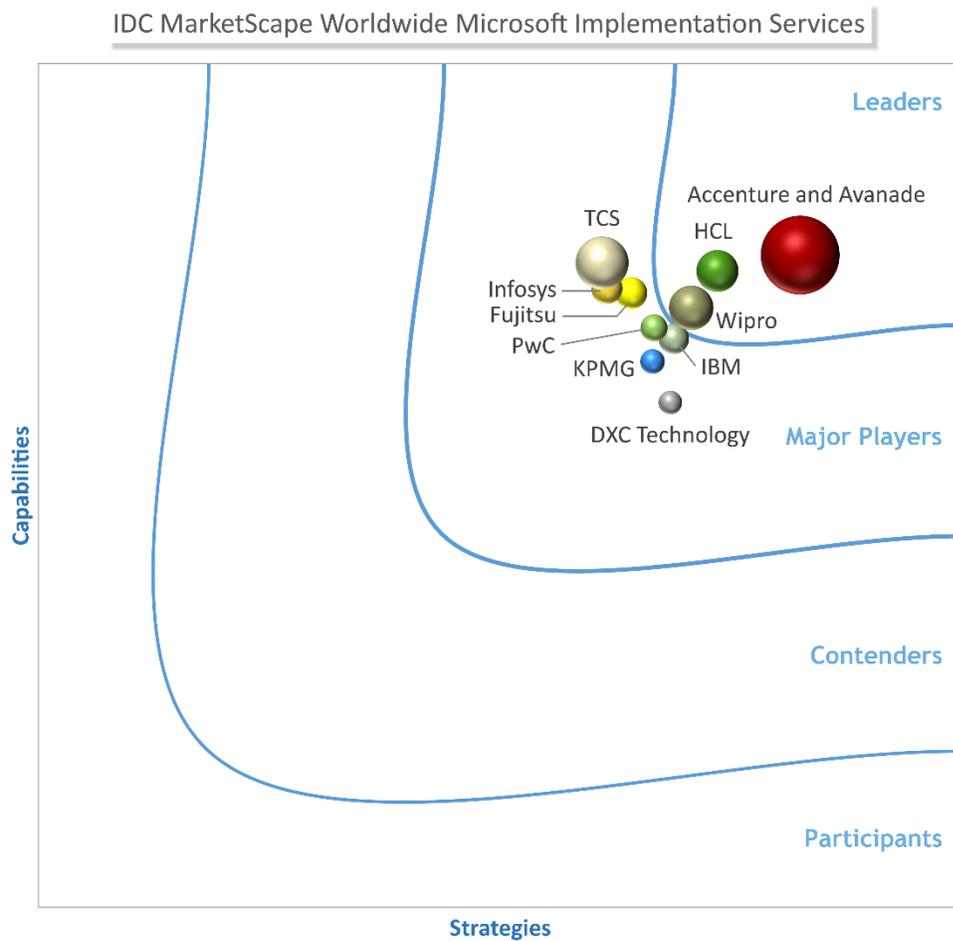
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THIS IDC MARKETSCAPE EXCERPT FEATURES ACCENTURE AND AVANADE

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Microsoft Implementation Services Vendor Assessment



Source: IDC, 2017

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

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape IDC MarketScape: Worldwide Microsoft Implementation Services 2017 Vendor Assessment (Doc # US43072917). 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 Figures 1 & 2.

IDC OPINION

This IDC study represents a vendor assessment of the 2017 Microsoft implementation services market through the IDC MarketScape model. This research is a quantitative and qualitative assessment of the characteristics that explain the success of a vendor 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 significant component of this evaluation is the inclusion of the perception of Microsoft implementation services buyers and 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 36 strategies and capabilities assessed, the offering or functionality road map and portfolio strategy attributes were rated most highly, on average, across all Microsoft implementation providers. The strategy attribute that received the lowest mean scores overall was marketing strategy.
- Based on the survey feedback from 59 of the evaluated vendors' customers, the subcategory customer service received the highest aggregate scores. The lowest aggregate score for any subcategory was for pricing model options and alignment, which is about the vendors' ability to offer flexible pricing models to meet client needs for Microsoft implementation services.
- Customers also want vendors with required business acumen and those that can deliver the right value for the price they charge for the projects. When buyers were asked what characteristics were required for a Microsoft implementation services project to be successful at a worldwide level, the top 2 characteristics were ability to achieve desired business outcomes and delivers project value for fee paid.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of 10 major Microsoft implementation services providers with broad portfolios spanning IDC's consulting and systems integration (C&SI) research coverage with global scale. This research includes analysis of the largest Microsoft implementation services vendors with broad portfolios spanning IDC's research coverage and global scale. This assessment is designed to evaluate the characteristics of each firm – as opposed to its size or the breadth of its services. Given this approach, Booz Allen Hamilton and Lockheed Martin have been excluded even though they are among the top 10 IT consulting and systems integration firms based on the worldwide revenue because the bulk of their revenues come from the U.S. government. The inclusion criteria also dictate at least \$150 million of revenue coming from a vendor's Microsoft implementation services practice at a worldwide level as well as a minimum of 1,500 Microsoft implementation-associated global resources; furthermore, at least 10% of revenue and 10% of head count need 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 as a "final judgment" on the firms to consider for a 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.

ADVICE FOR TECHNOLOGY BUYERS

- **Delivery model appropriateness and customer service.** Include vendor performance on these factors among your highest selection criteria. These were the top 2 strengths of Microsoft implementation services vendors as rated by customers that were surveyed for this IDC MarketScape.
- **Emphasis on value delivered and business goals.** Select services partners that have strong ability to deliver both. Buyers were asked what characteristics were required for a Microsoft implementation services project to be successful, at a worldwide level. The number 1 characteristic was the ability to achieve desired business outcomes, followed by delivers project value for fee paid. Given the fact that the top 2 project success factors for buyers focus on business aspects indicates that importance should be given to the vendor's ability to achieve desired outcomes while providing the right value required for the investment to deliver a successful project.
- **Use this IDC MarketScape for vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list vendors for Microsoft implementation service bids but also evaluate vendors' proposals and oral presentations. Because this analysis shows that the breadth and depth of services offered are strong for most systems integrators, make sure you understand where these players are truly differentiated and take advantage of their expertise.

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 one vendor's strengths and challenges.

Accenture and Avanade

According to IDC analysis and buyer perception, Accenture and Avanade is a Leader in the IDC MarketScape for Microsoft implementation services worldwide. Accenture and Avanade were evaluated as a single entity for this IDC MarketScape because their strategies, including go to market, and capabilities for Microsoft services are tightly integrated.

Avanade, the joint venture between Accenture and Microsoft, gives Accenture and Avanade a unique branding in the Microsoft services ecosystem. With 25+ years of partnership, Accenture and Avanade has a 360-degree relationship with Microsoft. This relationship allows Accenture and Avanade to have a go-to-market strategy that is closely aligned with Microsoft's strategy to take customers to the path of digital transformation. Accenture and Avanade offers solutions around digital customers, the digital workplace, business applications, IoT, cloud transformation, and engineering services that help facilitate a customer's digital transformation journey. In addition, Accenture has the ability to combine

broader end-to-end capabilities across strategy, consulting, digital, technology, and operations – in an industry context to help Microsoft clients in their digital transformation journey.

Strengths

Buyers rate Accenture highly for the end-to-end Microsoft services portfolio and its ability to work with software and hardware partners on a project. Similarly, IDC rates Accenture highly in terms of its offerings/functionality road map and productivity of its innovation/R&D.

Challenges

IDC believes Accenture's delivery model strategy could be improved by adding a more analytics-based approach to enhance and create next-generation tools. Also, Accenture would benefit from further upskilling its junior resources to deliver higher-value services and by adding crowdsourcing elements to augment its Microsoft resource base.

Consider Accenture When

Organizations should consider Accenture when they are looking for a wider range of consulting and implementation services, with an emphasis on business as well as technology change. Accenture should also be on the short list when users are seeking tight project management including flexibility in handling changes in project scope.

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 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.

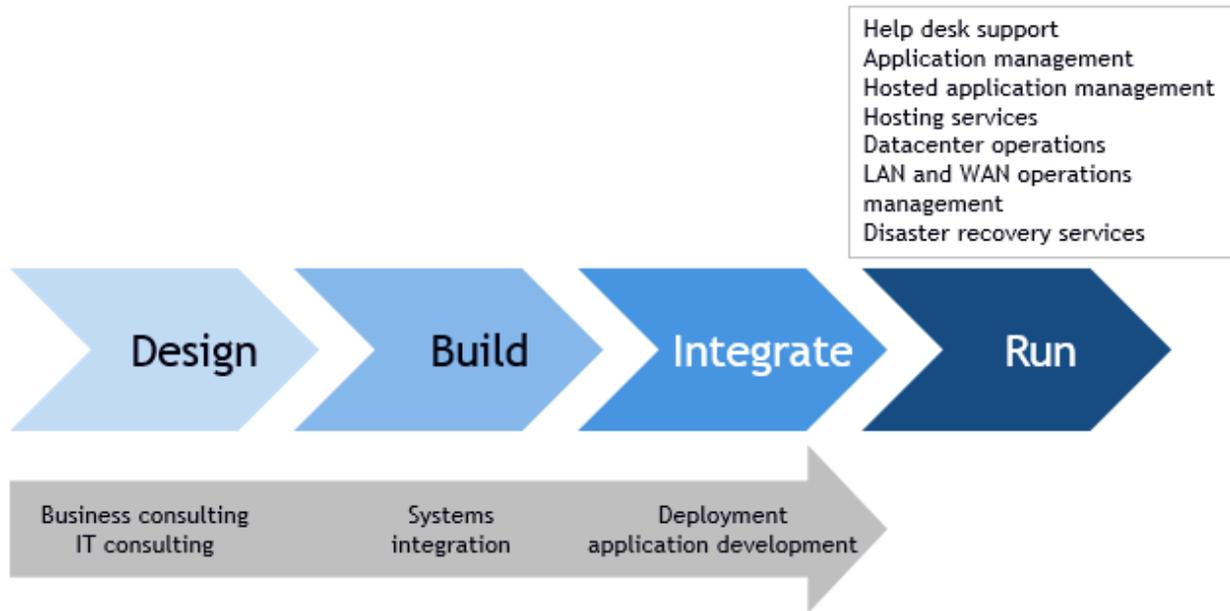
Note: All numbers in this document may not be exact due to rounding.

Market Definition

The Microsoft enterprise applications implementation services market covers the design, build, and integrate functions of the design-build-run function chain (see Figure 2). For the list of enterprise applications for this analysis, see the IDC MarketScape Vendor Inclusion Criteria section. For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2017* (IDC #US42356617, March 2017).

FIGURE 2

IDC's Design-Build-Run Function Chain



Source: IDC, 2017

LEARN MORE

Related Research

- *Worldwide and U.S. IT Consulting Services Forecast, 2017-2021* (IDC #US42499117, May 2017)
- *Worldwide and U.S. Systems Integration Services Forecast, 2017-2021* (IDC #US42499217, May 2017)
- *IDC's Worldwide Services Taxonomy, 2017* (IDC #US42356617, March 2017)
- *IDC MarketScape: Worldwide Microsoft Enterprise Applications Implementation Services Ecosystem 2015 Vendor Assessment* (IDC #US40150215, December 2015)

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 ecosystem. This IDC MarketScape covers a variety of vendors participating in the digital transformation services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and one another and highlights the factors expected to be the most influential for success in the market during both the short term and the long term.

"As the Microsoft enterprise application environment continues to evolve at a rapid pace, services providers must not only enhance their existing offering but also add offerings around new Microsoft solutions to stay relevant to customer needs," says Ali Zaidi, research director, IT Consulting and Systems Integration Business Strategies at IDC.

About IDC

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