

# IDC MarketScape: Worldwide Digital Strategy Consulting Services 2021 Vendor Assessment

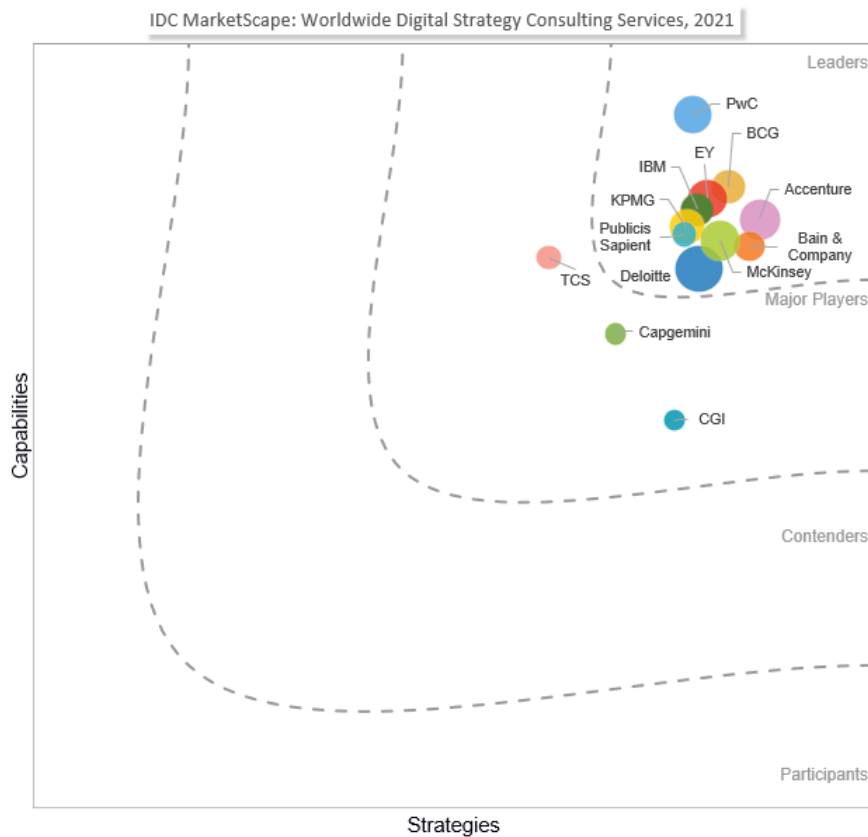
Douglas Hayward

THIS IDC MARKETSCAPE EXCERPT FEATURES BAIN & COMPANY

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Digital Strategy Consulting 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 Digital Strategy Consulting Services 2021 Vendor Assessment (Doc # US46766521). 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 study represents the vendor assessment model called IDC MarketScape. This research is a quantitative and qualitative assessment of the characteristics that explain a vendor's current and future success in the digital strategy consulting services marketplace. This study assesses the capabilities and business strategies of 13 prominent digital strategy consulting services vendors. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing digital strategy consultancy. A significant component of this evaluation is the inclusion of digital strategy consulting buyers' perception of both the key characteristics and the capabilities of these providers. This client input was provided primarily from the vendors' clients, supplemented with a worldwide survey.

Key findings include:

- **Consultancies are getting the basics right.** Reference clients that IDC spoke with were impressed by the quality of the people from the leading digital strategy consultancies. On average, reference clients gave consultancies highest scores for people quality, action orientation, and client-specific insight. This indicates that digital strategy consultancies are getting the basics right – they are recruiting smart and empathetic people and are training and developing them well, they are getting to know their clients inside out, and they are producing very useful advice as a result.
- **Clients want to be challenged more than ever by their digital strategy consultants.** At a time of immense cultural, demographic, and political change, businesses and public bodies are keenly aware that they must rethink what they do and how they do it, in the face of changing expectations from consumers and citizens. Most of the organizations that IDC has talked to during the research for this assessment said they want to be challenged more by their digital strategy consulting partners. Even when they say that their consultancy challenges them, they usually add that it doesn't challenge them enough.
- **Differentiation is arguably the Achilles' heel of the leading consultancies.** On average, clients gave their lowest score when asked how differentiated they considered their consultancy to be from its peers. With consulting still a very people-based business, and with consultancies often recruiting from each other and/or from shared talent pools such as elite universities, it is not surprising that even clients that were impressed by their digital strategy consulting partner often felt that they could probably get something similar from one of its competitors. This might indicate that consultancies need to invest more in branding and nonhuman differentiators (such as intellectual property [IP]). But arguably, it also indicates that consultancies would benefit from having more diverse workforces.

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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This research includes analysis of offerings from services providers with digital strategy consulting offerings worldwide, including those with broad portfolios and specialty services spanning IDC's research coverage.

This assessment is designed to evaluate the characteristics and buyer perceptions of each vendor, as opposed to its size or the breadth of its services:

- The first entry criterion for inclusion in this assessment was that a vendor appeared in at least one of the five supplier categories laid out in *IDC Market Glance: Digital Strategy Consulting, 3Q20* (IDC #US46364020, August 2020). Specifically, these five categories are business consultancies, IT consultancies, specialist consultancies, digital agencies, and regional players.
- The scope of this assessment is global and end-to-end services. Two of the vendor categories in the previously mentioned IDC Market Glance document, specialist consultancies and regional players, were therefore not used because the scope of this assessment goes beyond the range of services typically provided by vendors based only in these categories.
- Within the remaining three categories listed previously, the vendors selected for inclusion in this assessment were those that IDC considered to supply a broad and deep range of digital strategy consulting services globally. This included the capability to drive business model and operating model change for clients, robust industry-specific digital strategy capabilities, a broad range of tier 1 technology alliances, a body of published digital strategy thought leadership, and a global network of physical (and, following the COVID-19 pandemic, virtual) leading-edge client-facing innovation facilities.
- Those vendors finally selected had what in IDC's view were the most robust end-to-end global capabilities, accompanied by substantial business consulting and IT consulting capabilities, and were characterized by a balanced geographic distribution of revenue such that no single macroregion (Americas, Europe, the Middle East, and Africa [EMEA], and Asia/Pacific) accounted for two-thirds or more of the vendor's combined worldwide IT and business consulting revenue.

Other vendors on the market with less comprehensive services portfolios and/or with narrower geographic reach may be capable of providing the breadth and the quality of digital strategy consulting services required by clients, depending on the scope of the engagement. In addition, an organization's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for any engagement. As such, this evaluation should therefore not be considered a "final judgment" on the vendors to consider for an engagement.

## ADVICE FOR TECHNOLOGY BUYERS

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### Priorities Will Shift When the Pandemic Is Under Control – But We Don't Currently (Mid-2021) Know Exactly *When* That Will Happen

- **Today, resilience and profitability are the key enterprise strategic priorities.** For most organizations, the key priority during the COVID-19 pandemic has been to ensure survival of the enterprise by protecting their people, cash flows, and supply chains. Once that goal is secured, the focus usually switches to reworking the operating model – driving greater agility and speed to deal with rapidly changing environments and making the organization's

capabilities and culture more "digital native." That means allowing where necessary for partly or fully remote working and for new forms of customer and supplier engagement:

- According to IDC's *Global Buyer Perception of Business and IT Consulting Providers Survey*, carried out in December 2020 (353 organizations were polled worldwide), the top 3 strategic business objectives of organizations while the pandemic still rages are to "make our business more efficient and profitable," "make our business more resilient," and "attract, retain, engage, and monetize customers better." The fourth and fifth objectives, respectively, are to "make faster and smarter business decisions" and "better manage regulatory and compliance issues." This suggests that the top strategic priorities are essentially "defensive" or "resilience" drivers around efficiency, flexibility, and financial health.
- The focus for the resilient organization is to drive agility and ensure that it can operate normally and generate the cash flow (or at least secure the credit lines) it needs to invest for revenue growth when customer demand growth returns – given that this new demand growth may occur in a very different business and social environment after the pandemic is under control.
- Resilience may appear to be a purely defensive strategy, but in fact, it is about *preparing for growth* when consumer and business confidence returns after the pandemic is under control (whenever that might be).
- **Soon, however, innovation, agility, intelligence, and growth will be the focus for organizations.** When the pandemic ends or at least gets under control and some kind of normal life returns, the emphasis for businesses will be on *innovation and growth*:
  - When the 353 business and IT consulting buyers were asked in December 2020 what their strategic business objectives would be "in the post-COVID-19 world" (i.e., after the pandemic is under control, and people can mix freely again), their priorities switched dramatically from cost and efficiency objectives to growth-oriented objectives.
  - The top 2 strategic business objectives during the pandemic – "make our business more efficient and profitable" and "make our business more resilient" – are set to be relegated to sixth and seventh place, respectively, after the pandemic, while the number 3 objective during the pandemic – "attract, retain, engage, and monetize customers better" – is pushed less dramatically down to fifth place.
  - The top strategic objectives of organizations in the post-COVID-19 world are around innovation and growth. Organizations told IDC in December 2020 that their top 3 strategic objectives post-COVID-19 will be to "make our business more innovative," "make faster and smarter business decisions," and "expand into new markets and/or geographies." The fourth and fifth objectives, respectively, will be to "drive revenue growth in our existing business" and "attract, retain, engage, and monetize customers better."
  - These aforementioned findings were confirmed in IDC's April 2021 *Global Buyer Perception of Digital Strategy Consulting Services Providers Survey* of 711 buyers of digital strategy consulting services, which was carried out to support this vendor assessment. In this latest survey, buyers were asked to select the most important strategic business objective for their organization in the post-COVID-19 world. The number 1 priority globally was revenue growth, followed by profitability growth, with customer experience (CX) coming in third.
  - When digital strategy consulting buyers were asked in the April 2021 survey to name the business capabilities they thought would be most important in achieving their top strategic objective in the post-COVID-19 world, the top response was "organization" (defined as "our structures, processes, workflows, etc."), the second most popular response was

"service" (defined as "how we interact with our customers"), and the third most popular response was "design" (defined as "how we build offerings that customers will love to experience").

So the post-COVID-19 world – which is hopefully only a few months away – is about finding new revenue through new offerings and new channels ("make our business more innovative") and new customers, and doing all this faster than ever before, with revamped organizational structures and better customer-facing products and services. It's about expanding into new markets – whether geographic, demographic, industry, or whatever:

- The smart organizations are planning this offensive strategy now, if not already doing it. So it's important for CXOs to select consulting partners that understand both the defensive and the offensive strategies and can help them on both. It's not "one or the other" – the two strategies will overlap in 2021 and beyond. Indeed, the defensive/resilience strategy lays the foundation for the success of the "growth" strategy that will succeed it. But you would be well advised to be working on both strategies right now, and you will probably want to switch your focus from the one to the other as fast as you can when some sort of "new normality" arrives.
- Interestingly, according to the organizations that IDC polled in late 2020, technology investment priorities won't change dramatically post-COVID-19 – cloud will remain the top investment priority in the new business environment. But IoT and "edge" technologies, new agile ways of working, and process automation will become more important.

### Three Behavior Shifts That Are Already Visible

The new post-COVID-19 environment will likely see changed consumer and business behavior, partly as a result of the pandemic accelerating and prioritizing shifts in behaviors and beliefs that had already started to gather steam before the pandemic. Three notable examples are:

- There's a **huge shift to online commerce** as consumers continue to buy goods and services online and to get them delivered to their homes – sometimes because they still have little or no choice as lockdowns get reimposed. This means enterprises have to create new channels for selling to customers and to ensure that these channels come close to being as enjoyable and frictionless (and ideally more enjoyable) as the real-world channels that they are supplementing or replacing. But it also means that enterprises have to create new products and services that are more suitable for a "remote-first world" in which online commerce (at least for the moment) is the default and in which in-person commerce is a luxury that many unfortunately cannot access or afford:
  - This is not "just" about creating online buying channels, important though that is. It's also about the physical layer: How do you rework logistics and make "the last mile" successful, so that your product actually gets delivered safely and conveniently? It's also about product design and packaging: Do you have to redesign your product to make it more deliverable? How do you make your packaging attractive and yet environmentally friendly?
  - In any case, should you not be creating entirely new products, services, and experiences (either virtual or physical – or a mixture of both) to address the new expectations and behaviors of consumers and businesses that have emerged over the last year? These behaviors and attitudes may turn out to be long lived.
  - For organizations going direct to consumers (D2C) for the first time, this is about business model change – and associated cultural change – as much as it is about operating model change. That's a lot of change for organizations to absorb. Will you need business and IT consulting help with all this?

- There's a **demand for accountability and transparency** – organizations are being held to higher ethical standards, and consumers and even business buyers are increasingly claiming to make spending decisions at least in part on ethics and environmental, social, and governance (ESG) criteria. This ethical/ESG focus has been around for a while, but as new waves of consumers enter the market and start their careers, they seem to be more focused on this than the previous generations. Some questions you may need to ask are:
  - Are your offerings produced and distributed ethically? How do you treat your people and your suppliers? Do you and your suppliers have a diverse and fair employment profile? Do your factories and your distribution networks exploit people? Are your marketing materials and adverts deemed ethical and inclusive, and do they appear in responsible media outlets?
  - Do you need help to assess and benchmark yourself, to meet the new standards set by consumers and business, and to get yourself certified when you have done so?
- Linked to ethics/ESG is a **big shift to "purpose,"** and specifically to people claiming to prioritize their spend with purpose-led organizations. This is partly connected with social change such as the racial, social, and environmental justice campaigns that seemed to gain popularity and influence during 2020. It's also connected to people's wider feelings about job insecurity and unfairness in the economy, and notably it is connected with a worrying longer-term decline in the trust that people have in government. With trust in governments at low levels and continuing to fall, consumers increasingly look for ethical and moral leaderships from brands and their CEOs. Is that a good idea? Maybe not, but it nevertheless seems to be happening, and you have to deal with it:
  - This is potentially a hazard for brands, which run the risk on the one hand of being called out as hypocrites or worse by disappointed consumers and political activities and which on the other risk incurring the wrath of potentially powerful political and economic actors (as one retailer discovered when it was effectively boycotted in China early 2021 after wading into the controversy over alleged conditions in China supply chains).
  - What is your appetite for risk here? What is the potential upside of riding the wave of "purpose"? Are you riding a tiger that could throw you off its back at any time? But what are the risks and the downsides? Do you need help figuring this out? You might want to seek advice.

## What You Should Look for in a Digital Strategy Consultant in 2021

Given the likely shift in market dynamics toward an environment where innovation-fueled revenue growth becomes a more important strategic objective, many organizations will need to invest substantial sums in getting their technology, work practices, operating models, and even business models transformed. For many organizations, a consultant with experience and capabilities in technology, people, and organizational change can play an important role in creating and implementing a strategy for the future.

IDC's advice for organizations looking to use a digital strategy consulting services provider, based on conversations with enterprises during the field research for this assessment, includes the following:

- **Look for a mixture of pragmatism and strategic vision.** Particularly at a time of economic crisis, CEOs and shareholders want to see tangible results, "return on investment" ("ROI") from their spend on tech and business change. While it is important for a consulting partner to have a strong vision and point of view, you will need to have this intellectual leadership matched with actionable advice and execution and that is oriented toward your strategic needs.

- **Look for a strategic insight on technology, business, and people.** You may well need strategy advice – brand strategy, product strategy, sourcing strategy, ESG and purpose strategy, and so on, and this will likely come with significant technology implications. This business strategy insight will need to be framed in a way that ensures that the result is ground-level positive outcomes, and this requires sound understanding of the potential advantages (and risks) of technology, data, and process change. And if this change is to be successful, it will probably require changes to your organization's ways of working and even changes in the attitudes and behaviors of your employees – in other words, cultural transformation.

A great digital strategy consulting vendor will have experience and insight in all the aforementioned different dimensions of change, so look for credentials there and ask to speak to reference clients:

- **Ask to be challenged more – and every day.** This is a huge issue right now, and most of the organizations that IDC has talked to over the past year say they want to be challenged more by their digital strategy consulting partners. Even when consulting buyers say that their consultancy challenges them, they almost always add that it doesn't challenge them enough:
  - The reason is simple: the social, demographic, political, and behavioral shifts mentioned previously mean that the world seems to be turning upside down – it's as if everything is being thrown up in the air, and no one knows where the pieces will land. To deal with that uncertainty, you need to imagine what was previously the unimaginable, think what was previously unthinkable, and so on. That means challenging yourself, but it also means getting your consulting partner to challenge you constantly. If you don't do that, you risk being overwhelmed by that wave of economic and social change happening out there.
- **Look for a strategy partner that can quickly get to know you inside out – or that already does.** Ideally, your digital strategy consulting partner should know your organization better than you know yourself. This is so important for a very simple reason – in order to propose technology or process or cultural change that has a positive impact on your organization, a consultancy needs to know your organization really well. It needs to know what you are capable of doing – and what you are not capable of doing:
  - Is your organization's culture essentially conservative or radical? Do you have taboos that cannot be overcome? What kind of change would push your organization over the edge and into chaos? What kind of change would your leaders or employees either reject flat out or sabotage consciously or unconsciously? Realistically, would adopting technologies and behaviors that worked somewhere else really work for *your* organization? You and your consulting partner need to understand your capability for change at every level – senior management, middle management, shop floor, and so on.
  - Only by having your digital strategy consulting partner working its way through your organization can the partner find out these things. If the partner doesn't do that legwork, the partner's advice is not going to be practical, and it won't work.
- **Don't overpay, but look beyond the day rate for the real value of your digital strategy consulting partner.** Most organizations would like to pay less for digital strategy consulting – although one enterprise that IDC talked to actually gave its digital strategy consulting partner an unprompted out-of-contract financial bonus without being asked. But generally speaking, who wants to pay more than they think they need in order to get the job done? That explains in part why consultancies need to propose innovative payment mechanisms linked to business outcomes or that share risks and rewards and so on. Closely aligning the financial incentives of the client and the consultancy is one way to ensure that money is well spent:
  - That said, once the consultancy has proposed an innovative pricing mechanism, the client often decides that it wants good old-fashioned fixed pricing, or even time and materials

(T&M). It's often a game of bluff, in which the client wants the consultancy to show it all the options, but then the client returns to its default pricing mechanisms.

- The key thing is not to micromanage the "right" day rates or fixed pricing but to ensure that the advice you get is based not just on deep insight of your business, your industry, and your customers but on demographic, economic, political, and social trends, and of course on technology. It's about getting the right balance between cost and value delivered.
- The key is also to ensure that the advice you buy is based on a deep understanding of your *people side*, your culture, purpose, and institutional behaviors and beliefs. Many times during the field research for this assessment, enterprises told IDC that the advice they received was very expensive just looking at the price tag, but it was actually good value for money because it was so well crafted to their needs *and their capabilities* as an organization. That understanding and insight does not come cheap, but when it works well, it's worth the premium.
- **Look for strategy partners that can exploit their experience and global reach to bring you best practice from other industries and geographies.** One of the most important benefits that a consultancy can bring its clients is the insight that it gets from working with other clients. Sometimes these insights are a straight read-across from your peers in your industry, but sometimes they can come from a completely different industry. They are often from a different geography. Organizations that IDC talked to for this assessment highly valued this insight, and indeed one of the capabilities they prized most from their consultancy was when it could connect them directly to other clients (e.g., through dedicated conferences, interest groups, and site visits) to learn from each other.

One of the things to look in a consultancy is therefore whether it has a robust collection of client communities and whether it has multiple ways to connect you to people that you can learn from, whether they are your peers or from a totally different type of organization.

## 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.

### Bain & Company

According to IDC analysis and buyer perception, Bain & Company is positioned in the Leaders category in the worldwide 2021 IDC MarketScape for digital strategy consulting services.

Bain & Company, founded in 1973, is one of the largest private management consulting organizations globally, with around 13,000 employees based in 59 offices across 37 countries.

Bain works in 22 industries, including financial services, healthcare, energy and natural resources, advanced manufacturing and services, consumer products, retail, technology, telecommunications, and private equity.

Bain has a number of offerings to help its clients design, build, and scale their digital strategies, including:

- Radar 360 Strategy, a framework developed in collaboration with the WEF and senior executives of 40 global companies to help clients stretch their ambition and transform their



business to win today and in the future, including Radar 360 Digital GPS, a diagnostic tool to assess companies' digital maturity, and Future Back Explorer, an app for clients to navigate disruption affecting their sectors

- Launchpad, a program combining design thinking, start-up methodologies, digital expertise, and a results-driven focus to help clients launch and scale new digital ventures
- Simple and Digital, an approach to deliver better customer experience at superior economics based on human-centered design, customer analytics, and a nimble IT infrastructure
- NPS Prism, a customer experience benchmarking service that allows clients to compare themselves with competitors on overall NPS and on every step of the customer journey
- Test For Results, an in-market testing approach to marketing and sales that helps optimize all steps of the funnel, improve conversion, and deliver a seamless user experience
- Supply Chain Edge, a suite of digital and analytics tools that help clients use their supply chain as a strategic weapon
- Technology and data transformation to help clients realize a digital-ready IT and data infrastructure
- ARC, a digital tool that monitors transformation progress and fosters collaboration

Vector, Bain's integrated "Digital Delivery platform," brings together the people, processes, technologies, ecosystem partnerships, and support services to help clients deliver their digital strategy. Vector includes experts, former digital and tech executives of large companies and start-ups, data scientists, designers, developers, and engineers. Vector consists of seven competences:

- **New Business Innovation:** Corporate innovation, start-up ecosystem, and VCaaS
- **Product and Experience Innovation:** Raw customer needs discovery, experience and product design, and MVP development
- **Digital Marketing:** Strategy and execution, opportunity assessment, modernized operating model, and proprietary CX
- **Advanced Analytics:** Data strategy, capability building and analytics use cases, and portfolio management and implementation
- **Automation:** Diagnostic, business case, road map and partners, and pilot and scaling
- **Enterprise Technology:** Strategy, systems and architecture, cybersecurity, operating model, cost management, delivery assurance, and M&A
- **Partnership Ecosystem:** Bain's Alliance Ecosystem of technology partners and network of advisors

Bain has a network of 13 dedicated Digital Innovation Hubs across the globe, with ideation, agile, and immersive technology rooms and space for broader collaboration and start-up networking. Beyond these hubs, each Bain office has modular spaces for hosting brainstorming and sprint sessions with clients.

Bain hosts a number of client communities. These include Bain Lounges, such as the Bain Bankers Lounge and the Bain Insurers Lounge, and Bain Circles, a regional platform for executives within an industry to share experiences.

Key annual thought leadership from Bain includes the firm's inaugural *Technology Report* in 2020, which looks at how companies are using technologies to increase resilience and accelerate growth. Bain has recently published books such as *Doing Agile Right* and regularly writes articles in journals such as the *Harvard Business Review*.

Bain works with tier 1 technology vendors including AWS, Microsoft (including Azure), Google (GCP), Salesforce, and SAP and with a curated ecosystem of 50+ technology alliance partners, like Endava and Mphasis.

Bain has made acquisitions to expand its digital capabilities. In 2020, the firm acquired QVARTZ, a Nordic consulting firm with analytics and innovation/design consulting capabilities; Pangea, an Italy-based analytics consulting firm; and Sutton Place Strategies, a deal origination tool and transaction database for private equity firms, corporate M&A teams, and deal advisors. Bain has also made minority equity investments in key tech alliance partners, such as Endava and Pricefx.

Bain's open innovation networks include the New Business Innovation capability, which encompasses an innovation ecosystem including start-ups, venture capitalists (VCs), accelerators, and incubators; Bain's Alliance Ecosystem, the company's network of third-party partnerships; and Baincubator, its corporate incubator program. Bain also has a global network of more than 300 advisors.

In the social and environmental space, Bain has dedicated practices for Sustainability and Corporate Responsibility; Diversity, Equity, and Inclusion (DEI); and Social Impact. In 2020, Bain worked with the Coalition for Farmer-Allied Intermediaries to transform and build more resilient African food systems. Bain is also a founding member of OneTen, a coalition of companies taking action to upskill, hire, and advance 1 million Black Americans over the next 10 years into family-sustaining jobs with opportunities for advancement.

Bain's mission since foundation is to "help our clients create such high levels of value that together we set new standards of excellence in our respective industries." Bain's vision is to help clients be digital winners, assisting them in conceptualizing, designing, building, and scaling digital businesses that create high levels of value and set digital standards of excellence. To do so, Bain brings Vector, an integrated platform of digital capabilities, together with a "best-of-breed ecosystem."

## **Strengths**

On average, the three areas where Bain reference clients commended the firm most highly were for client insight, people quality, and action orientation. Comments from Bain clients included:

- "They obviously know our industry well. They know our senior leadership; they know our strengths and our weaknesses well. And as a result, their strategy is rooted in our culture and our politics and our capabilities."
- "Bain are expensive, but they're worth it. They are very adaptive to our organizational culture. It's not like they come in and they have all the answers – they are very collaborative."
- "Bain were very effective in understanding what might be an ideal answer that takes a lot of time, versus something that can be implemented tomorrow morning. Every decision had that trade-off built in, to give us the ability to get to market quickly."

## **Challenges**

Bain has the opportunity to improve its perception among clients in cultural transformation and to make further progress in value for fees paid.

## **Consider Bain & Company When**

Bain is a good choice for organizations looking for a consulting partner that combines deep industry and client knowledge with a strong pragmatic focus. As one client said: "Bain is best at consulting in action, when launching something or creating something from nothing. There's a practicality in their

thinking, which I like. I would just use them for stuff that is truly complex and has the potential to be game changing."

## 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.

Note: IDC does not publish market shares for digital strategy consulting services. IDC has therefore estimated these market shares specifically for the purposes of this assessment.

### 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

Digital strategy consulting services are project-oriented services that help clients define how they will use "digital" (3rd Platform) technologies and services to achieve their strategic objectives.

Digital strategy consulting services show the client how to derive business value from deploying 3rd Platform technologies and services, typically including cloud services, big data and analytics (BDA), mobility, cognitive/artificial intelligence (AI) technologies, social business, next-generation security, the Internet of Things (IoT), and other next-generation technologies such as blockchain and quantum computing.

Digital strategy consulting services are chiefly composed of business consulting activities, including strategy consulting, supplemented with technology consulting activity.

Digital strategy consulting services *do not include the actual implementation* of digital technologies and the actual transformation of business processes and organizational structures that invariably accompany the deployment of new digital technologies and services.

However, digital strategy consulting services may, on occasion, contain a small element of software development services and product engineering services to produce proofs of concept, prototypes, or minimum viable products (MVPs).

## LEARN MORE

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### Related Research

- *IDC Market Glance: Digital Strategy Consulting, 3Q20* (IDC #US46364020, August 2020)
- *Worldwide and U.S. Digital Strategy Consulting Services Forecast, 2020-2024* (IDC #US46363820, July 2020)
- *IDC MarketScape: Worldwide Digital Strategy and Agency Services 2017 Vendor Assessment* (IDC #US41462717, August 2017)
- *IDC MarketScape: Worldwide Digital Strategy Consulting Services for Digital Operations 2016 Vendor Assessment* (IDC #US40634616, January 2017)
- *IDC MarketScape: Worldwide Digital Strategy Consulting Services for Digital Product Innovation 2016 Vendor Assessment* (IDC #US40634716, January 2017)

### Synopsis

This IDC study uses the IDC MarketScape methodology to provide an assessment of 13 of the major providers of digital strategy consulting services worldwide. This evaluation is based on a comprehensive framework and a set of parameters that assesses providers relative to one another and measures vendors according to those factors expected to be most conducive to success in a given market during both the short term and the long term.

"Businesses and public bodies have never in living memory experienced such a disruptive and fast-moving environment on multiple levels – including the economic, social, demographic, technological, and political levels," said Douglas Hayward, research director, Digital Strategy and Agency Services at IDC. "Organizations face a range of challenges and opportunities whose effects for many of them will be transformative. Technology will play a key role in how they sense, understand, and then address the challenges and opportunities that will define their immediate and possibly long-term future."

"Clients are therefore looking for consulting partners that anticipate how the world around them is changing, that can help them craft a vision for the future, and that grasp the centrality of technology in understanding and meeting new consumer and business needs," added Hayward. "And just as importantly, at a time when the world is seemingly being turned upside down, they want partners that challenge them and open their eyes to new possibilities. Great digital strategy consultancies do all this by operating not just at the business and technology levels but at the human level, too."

## 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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