



IDC MarketScape

IDC MarketScape: Asia/Pacific Business Consulting Services 2015 Vendor Assessment

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IDC MARKETSCOPE FIGURE

FIGURE 1

IDC MarketScape Asia/Pacific Business Consulting Services Vendor Assessment



Source: IDC, 2015

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

IDC OPINION

This IDC 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 marketplace. This study assesses the capability and business strategy of many of the leading business consulting firms. This evaluation is based on a comprehensive framework and set of parameters expected to be most conducive to success in providing business consulting services during both the short term and the long term. A significant and unique component of this evaluation is the inclusion of business consulting buyers' perception of both the key characteristics and the capabilities of these consulting providers. As one would expect of market leaders, overall, these firms performed very well on this assessment. Key findings include:

- In Asia/Pacific, consulting providers are generally considered quite capable with regard to the critical capabilities of meeting the project timeline, providing high-quality staff and services, leveraging change and innovation that produces results for the client, and integrating appropriate technologies to produce results. They are also considered very capable when asked to help clients expand into new markets/geographies, identify and implement options for growth, and reduce costs.
- Surprisingly, this evaluation discovered that generally enterprises are disappointed with the consulting provider's ability to manage risk during the engagement – an essential component of many projects. Consultants were also not as strong at helping evolve to use "digital" approaches to improving products and services or improving operations. This is in spite of the importance Asian firms place on this issue and the effort most consulting providers have expended to improve their digital capabilities during the past couple of years.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of the five largest business consulting firms and additional firms with broad portfolios spanning IDC's research coverage and with global or regional importance. This assessment is designed to evaluate the characteristics of each firm – as opposed to its size or the breadth of its services. 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

Business requirements demand solutions that work holistically within an enterprise. These solutions are often complex and require multiple domains of expertise and stakeholders from a variety of areas to ensure success. As a result, consulting projects are often complex. To maximize value and minimize disruption, enterprise leaders must:

- Ensure a project is strategically valuable (be sure of full organizational commitment).
- Create visible links between project strategy and "business execution."

- Integrate all impacted LOBs throughout the project to ensure stakeholder needs are fully satisfied.
- Anticipate and address the common obstacles to successful consulting projects. These include:
 - **Scope creep**, which can undermine focus and increase cost of projects
 - **Organizational change**, which is often underestimated, especially as project scope or complexity increases
 - **Insufficient internal resources** assigned to the project, which decreases project awareness of interdependent issues and increases reliance on external consultants for critical, interlock activities

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

According to IDC analysis and buyer perception, Accenture is an IDC MarketScape Major Player for business consulting in Asia/Pacific.

Accenture offers a broad array of management consulting services and has deep expertise in key industries, helping its clients dig into their issues, explore the opportunities they have, and define an outcome in economic and stakeholder terms that help drive their business forward and deliver results. In other words, Accenture sees itself as a strategic and operational management consultant willing to pursue a number of innovative value-based approaches with its clients tied to realize results. As of September 2014, Accenture had more than 318,000 employees, with growth that appears to be well distributed by geography.

Accenture's management consulting capabilities are found primarily within the Accenture Strategy growth platform, established in January 2014, and the company's industry operating groups. Accenture Strategy is responsible for the development and delivery of business, technology, and operational strategy consulting. Business strategy includes business innovation, digital business strategy, enterprise transformation, manufacturing strategy, mergers and acquisitions (M&As), and sustainability services. Technology strategy comprises enterprise architecture and application strategy and information technology (IT) strategy. Operational strategy includes CFO and enterprise value, sales and customer service (CRM), talent and organization, and operations. Accenture is also active in risk management consulting, a service offering that predominantly serves the financial services sector.

With the establishment of Accenture Strategy, Accenture has created a smaller and more agile strategy consulting organization of more than 8,000 employees. The delivery of operational consulting projects is now provided through the company's five industry operating groups: communications and high tech, financial services, health and public services, resources (energy, utilities, chemicals, and

metals and mining), and products (industrial manufacturing, CPG, retail, healthcare, automotive, and transportation). These are specialized teams that provide industry-specific management consulting services, which draw from Accenture's functional service areas but are customized and adapted to each industry.

The changes introduced by Accenture will help support the company's portfolio of over 40 industry business services – end-to-end solutions that combine consulting, technology, and outsourcing capabilities. These asset-rich solutions and services are designed to address particular sector requirements, such as more efficient mortgage processing or accelerating pharmaceutical R&D.

Accenture Strategy develops and scales specific and differentiating skills within its Capability Network. This incorporates a client-facing Global Talent and Innovation Network, which provides capabilities in high-demand areas, such as sourcing, procurement, and analytics, from a growing number of regional centers around the world – this satisfies client demand for consulting to be provided at speed and at scale. These are backed up by Accenture's innovation centers, centers of excellence, approaches, and assets that are both function and industry focused.

Accenture Interactive, the company's marketing and digital marketing services practice, and Accenture Analytics are now housed in the newly formed Accenture Digital, along with mobility consulting and delivery. The Accenture Strategy and Accenture Digital growth platforms work closely with the other two growth platforms – Technology and Outsourcing.

Knowledge sharing and resource allocation are strong assets within Accenture, largely driven by the unified construct across all of Accenture's growth platforms. The singular approach makes working with the firm easier for clients and helps strengthen client relationships.

Accenture credits its ability to focus research and expertise on key and emerging markets to the renewed growth of the firm across the full spectrum of its business as well as in all geographic areas. Examples of research published in 2014 include *Accelerating Europe's Comeback: Digital Opportunities for Competitiveness and Growth*. A continued focus on functional issues was addressed through publications including *The CFO as Architect of Business Value: Delivering Growth and Managing Complexity*, *Thriving on Volatility: Accenture Global Operations Megatrends Study*, and *Leadership Imperatives for an Agile Business*. Accenture's emphasis on execution and delivering measurable value is exemplified in the growing number of value-based arrangements. For instance, Accenture worked with Michelin to improve its inventory performance, helping consolidate the supplier base and recode hundreds of thousands of spare parts. The 100% value-based arrangement also rewarded Accenture against KPIs for achieving knowledge transfer goals once the process changes had been implemented.

Strengths

Accenture is regarded among clients in the Asia/Pacific region as among the best firms for directly improving overall commercial performance and leveraging staff appropriately.

Challenges

Conversely, customer perception is that Accenture needs improvement when it comes to helping customers manage risk, reduce costs, and create a more efficient business. When on an engagement, Accenture should improve the impression that its teams can recommend changes that produce results, deliver innovation, and provide maximum value on a project.

Boston Consulting Group

According to IDC analysis and buyer perception, Boston Consulting Group (BCG) is an IDC MarketScape Contender for business consulting in Asia/Pacific.

BCG, employing 4,400 consultants, is among the most globally recognized strategy consulting firms. BCG organizes its capabilities into corporate development, corporate finance, operations, strategy, marketing and sales, information technology, and organization, with other areas of focus including innovation, turnaround, transformation, postmerger integration, globalization, sustainability, managing in a slow-growth economy, and growth. The industries served by BCG include automotive, biopharmaceuticals, consumer products, energy and environment, engineered products and project business, financial institutions, insurance, media and entertainment, medical devices and technology, healthcare payers and providers, metals and mining, private equity, process industries, public sector, retail, technology and software, telecommunications, transportation, travel and tourism, and social impact. BCG is credited with pioneering a number of strategy frameworks for the management consulting industry as BCG's focus on conceptual, strategic thinking has yielded ideas that have become classics of strategy, including the experience curve, time-based competition, sustainable growth, and total shareholder value – concepts that many organizations have leveraged to improve their competitive positions.

BCG has remained a large strategy firm that still mainly focuses on strategy rather than also building a large operations practice around which it can bundle strategy services. The firm does have some operational capabilities, particularly around the supply chain management element of postmerger integration work.

Research published by BCG is based on survey findings and typically delves deeply into either a specific industry's business concern or regionally specific business issues, recently with a significant focus on emerging economies. Publications in 2010 that illustrate the depth and far-reaching impact BCG addresses include *What's Next for Alternative Energy?*, *Big Prizes in Small Places: China's Rapidly Multiplying Pockets of Growth*, and *Winning in Emerging-Market Cities: A Guide to the World's Largest Growth Opportunity*. BCG is recognized for expanding its deep regional insights in emerging economies supported by investments and proprietary resources, including BCG's China Center for Consumer and Customer Insight.

As a company culture, BCG grows organically. Geographic areas of expansion for BCG in 2011 included Morocco, Africa; Istanbul, Turkey; and Canberra, Australia (sites of three new offices for BCG). Another area of growth for BCG is focusing on public issues and financial services clients. In Mexico and Latin America, BCG has been aggressive in preparing services around IFRS compliance by training staff and reducing services costs.

Strengths

Among clients in the Asia/Pacific region, BCG is regarded as the strongest firm for integrating appropriate technologies into an engagement. BCG is further considered to be one of the best at providing high-quality service, as well as the necessary spectrum of IT consulting services.

Challenges

In identifying opportunities for improvement, clients believe BCG must improve its ability to help them reduce costs, transform processes, and improve operational efficiency. When on an engagement, BCG must also strive to improve the perception that it can integrate its project team with the client's, provide functional or technical insights, and recommend changes or innovations that produce results.

Deloitte

According to IDC analysis and buyer perception, Deloitte is an IDC MarketScape Major Player for business consulting in Asia/Pacific.

Deloitte offers capabilities that span strategy and operations, human capital, technology, outsourcing, finance, risk and cybersecurity, legal, and tax and assurance. Deloitte has a base of 210,400 practitioners – of which 54,000 are newly acquired talent. Deloitte maintains offices in 150+ countries.

Deloitte has explicitly stated its continued focus on and commitment to its core businesses which its clients expect and demand, but the firm is also rapidly evolving and innovating ahead of the industry to align against its clients' emerging needs driven by increasing complexity, speed of change, and unprecedented disruption. Over the past year, Deloitte has made the following investments in its business:

- **New solutions:** Deloitte is focused on delivering high client impact solutions that respond to big trends and leverage digital. One of the key ways Deloitte does this is via its Integrated Marketing Offerings (IMO) that take advantage of the firm's depth and breadth, industry insight, and geographic reach. Recent new IMO offerings include Digital, Crisis Management, and City Solutions.
- **New collaborations:** Deloitte is creating alliances and partnering with innovators in areas such as digital, crowdsourcing, 3D printing, and artificial intelligence. These alliances help Deloitte better sense, create, and develop new opportunities for clients. Example partnerships include 10EQS, 3D Systems, FutureWorld, Guavus, Kaggle, London Business School, the MIT Media Lab, and Singularity University.
- **New acquisitions:** In its last reported fiscal year 2014, Deloitte successfully completed 25 strategic acquisitions and made 27 significant team hires in both developed and priority markets, as well as industry and priority capability areas. Deloitte is focused on acquiring assets of strategic importance such as social, mobile, cloud, analytics, legal, strategy, cyber, and risk.
- **New models:** Deloitte is also focused on delivering "faster time to value" for its clients, diversifying its delivery model through product- and subscription-based businesses. Deloitte predicts that by 2020, at least 15–20% of its revenue will be associated with new services,

solutions, or delivery models. Examples include Deloitte Analytics, Bersin by Deloitte, and ConvergeHEALTH. Deloitte also moved its Innovation Centers under the single brand of "Deloitte Greenhouses." Greenhouses are flexible, physical, interactive environments, geared to solving clients' most challenging issues in new and highly accelerated ways. Deloitte has Greenhouses in nine countries, with a further four coming online soon.

Deloitte has industry specialties in major sectors, including consumer business and transportation, energy and resources, financial services, life sciences and healthcare, manufacturing, public sector, real estate, technology, and media and telecommunications. Deloitte continues to evolve its industry model, serving 30 micro-industry sectors across capabilities and geographies.

Deloitte is recognized as an employer of choice, as evidenced by its recognition in many independent rankings in North and South America, Europe, the Middle East, and Asia. Deloitte is known for promoting flexibility and customization for each individual employee's career path via its Mass Career Customization (MCC) program and its development and adoption of the corporate lattice career model where employees no longer move up and out in the antiquated "corporate ladder" structure but move more fluidly and flexibly throughout the organization as desire and demand require. Deloitte has also made significant investments in training and education for its employees with Deloitte University, a state-of-the-art leadership development center near Dallas, Texas. Deloitte University served more than 63,000 Deloitte professionals from 81 countries over the past year. This year Deloitte added campuses in Europe and Asia/Pacific.

Deloitte recently laid out its new Strategy 2020 aided by the assets of its Monitor acquisition. Deloitte has set out the following strategic choices that serve as guidelines for its future actions and build on Deloitte's traditional strengths, including:

- Clients first
- Focus on capability depth
- Making big bets on big disruptors
- Commitment to people, brand, and culture

As with the other "Big Four," Deloitte does not provide consulting services to its audit or attest clients but does benefit from the strong client relationships it has established with audit customers.

Strengths

Among clients in the Asia/Pacific region, Deloitte is seen as the most capable of all firms at integrating risk awareness within other consulting engagements. In addition, clients in the region view Deloitte as among the strongest for delivering value-creating innovation: helping clients transform significant processes, create more effective businesses, and improve operational efficiency; integrating its project team with the client's; and supporting business change across an organization.

Challenges

Deloitte does have opportunities for improvement, however, in terms of the perceptions of its ability to meet project timelines, understand the unique needs of the client's business, and deliver high-quality service.

EY

According to IDC analysis and buyer perception, Ernst & Young (EY) is an IDC MarketScape Leader for business consulting in Asia/Pacific.

EY is a partnership with 190,000 professionals as of June 2014 across 150 countries globally. EY is one of the fastest-growing business consulting companies, with many countries presenting double-digit growth. EY's purpose is to help clients realize their potential based on the belief that when businesses work better, the world works better.

EY's core business consulting services sit within EY's advisory organization and include Risk, Finance, Supply Chain, Customer, People and Organizational Change, Program Management, and Strategy Consulting, all enabled by EY's IT Advisory practice. Through these services, EY is able to support businesses in transformation, innovation, managing risk, analytics, cybersecurity, and digital. And, rather than providing a siloed digital practice, digital skills are embedded throughout EY's business consulting teams.

EY also offers business consulting services primarily within its advisory organization and additional support for assurance, tax, and transactions as well as post-transaction integration services, tax-effective process advisory, fraud investigation and disputes management, climate change and sustainability, and financial accounting advisory services.

EY's service lines are integrated in front of the client through the role of the client service partner (CSP), a dedicated relationship management role. The relationship role of the CSP helps bring together services from across the whole firm. EY delivers through sectors and is deeply investing in industry-specific process and risk models, which it delivers through its 14 global industry centers of excellence.

EY serves large international as well as medium-sized companies and regional and national organizations. EY has integrated delivery of firm services by forming single management units in its Americas, EMEA, and Asia/Pacific regions to make serving clients globally more effective. EY has been investing in emerging geographies and has a large global talent hub based primarily in India, with additional regional resources in China, the Philippines, and Eastern Europe. EY leverages these resources in support of global projects.

In addition to its global footprint and its organic growth, EY has continued to acquire companies to strengthen its offerings. Over the past 12 months, these acquisitions have included Bedrock Consulting and The Parthenon Group in strategy, LogiStar Solutions in supply chain, and Five Point Partners in power and utilities. EY has also formed alliances with partners such as SAP, IBM, Procter & Gamble, and Guidewire, enabling itself and its clients to tap into a wide ecosystem of knowledge, skills, and innovation.

Through its Global Enablement Center, EY supports and leads global research and innovation initiatives. EY also develops and delivers methodology enhancements and extensions to its core methodology as well as enhancements in its process and risk models. For example, four recent enablement center offerings are enterprise intelligence, risk transformation, cost of controls, and finance transformation.

EY has established centers of excellence in its regions around specific services, including supply chain, customer, finance transformation, risk transformation, IT transformation, information security, analytics, and outsourcing. EY has also developed strong collaborative relationships with research/academic institutions, including the Risk Innovation Board, Tapestry Networks, and Innovation Value Institute.

EY relies on its extensive business network to leverage long-term relationships with CXOs. This approach is aimed at maintaining EY's objectivity in the advice the company gives to clients. EY maintains strong relationships with key technology vendors and has expertise in their products to ensure the company's professionals have the highest levels of technical know-how.

Strengths

Clients in the Asia/Pacific region regard EY to be the most capable of all firms at helping them transform significant processes, integrating its own project team with that of the client, and transferring knowledge to the client. EY is also highly regarded in such engagement practices as maximizing project value, using appropriate analytics, and meeting deadlines – all areas in which the company is seen as among the most capable firms.

Challenges

The biggest opportunities for improvement appear to center around technology: clients in the region perceive EY to be significantly below peers in terms of helping them evolve their digital capabilities, integrating appropriate technology into engagements, and providing the necessary spectrum of IT consulting services.

IBM

According to IDC analysis and buyer perception, IBM is an IDC MarketScape Major Player for business consulting in Asia/Pacific.

IBM is one of the largest multidisciplinary consulting firms, with more than 100,000 employees globally in its consulting services business, serving clients in more than 450 locations across 170 countries. IBM provides consulting services across a wide range of topics, functions, and industries through IBM Global Business Services (GBS).

For several years now, IBM has held the perspective that the world has been fundamentally transformed by rampant availability of data and the technologies to exploit it for rapid transformation, like mobility, cloud, and engagement.

IBM has made significant investments over the past 12 months in the skills, solutions, and go-to-market structure around analytics, mobility, cloud, and engagement. In January 2014, IBM combined strategy consulting, business analytics, optimization services, and IBM Interactive digital capabilities to help clients accelerate these front-office transformations. IBM states it's seeing increased demand for solutions that combine all of these capabilities – strategy consulting, design, experience, and analytics – to help clients create business strategies that can rapidly deliver outcomes and build better models of engagement. Important to IBM's market approach, the Business Analytics and Strategy practice has been aligned by domains to target the buyers of consulting services, like the CFO and the COO. With more than 15,000 consultants, IBM claims it's delivering this new combination of skills to hundreds of clients today like Banorte-Ixe – a leading Mexican bank working with IBM in an outcome-based model to transform the entire bank – or Citi – one of the first clients to deploy IBM and Apple's new apps for enterprise mobility.

IBM launched several new offerings and partnerships in the past 12 months in support of these new client agendas and the social, mobile, analytics, and cloud technologies that are enabling them. Since May 2014, IBM has announced a long list of Cloud Business Solutions that incorporate industry expertise, business services, analytics, software, and infrastructure, integrated and customized to client requirements and delivered in a subscription-based model. These business-focused cloud solutions are Customer Intelligence, Digital Commerce, Marketing Management, Counter Fraud, Predictive Asset Optimization, Care Coordination, and Telematics analytics, to name but a few.

Extending its investment in IBM Interactive Experience, ranked by Ad Age as the largest digital agency globally, IBM is investing more than \$100 million in global expansion with 10 new labs, bringing the total to 14 globally and adding an additional 1,000 personnel. Its digital front-office maturity assessment incorporates more than 400 different digital capabilities across 20 maturity models. These teams also have a repository of Customer Journey Maps and wall murals that bring together strategy, technology, best practices, and outcomes, founded in either a customer-centric view or a functional transformation view, across 18 industries.

In June 2014, IBM announced an exclusive partnership with Apple to bring iPhone, iPad, and IBM MobileFirst for iOS apps to enterprises around the world. This multifaceted partnership will deliver 100+ enterprise-grade mobile apps, enable enterprise-scale device acquisition, and offer financing, activation, and life-cycle management as well as enterprise-scale service and support.

In November 2014, IBM and Twitter announced a partnership where IBM will incorporate Twitter content throughout various cloud-based data and analytics solutions across IBM. IBM consultants will also have unlimited use of Twitter data during advisory services with clients, exposing them to "voice of the planet" for better customer insights.

With more than 5,000 dedicated mobility consultants, IBM has extended its mobile advisory services with key offerings like the Enterprise Mobile Strategy Accelerator that helps CXOs shape enterprise mobile strategy and Mobile Moments Process Design, Mobile/Digital Target Operating Model, and Mobile IT Strategy to help CIOs envision future IT processes for mobile application life-cycle management (DevOps) and mobile IT governance.

Scaling digital and consulting capabilities continues to be an important differentiation for IBM. To ensure globally consistent delivery, IBM has developed industry centers of competency (CoCs) and

domain and technology CoCs, including many that combine skills from both GBS and IBM Software Group in areas like advanced analytics or mobility. These CoCs are staffed with more than 1,000 senior consultants who can be deployed rapidly anywhere in the world. They have deep backgrounds in their respective fields and bring a unique global perspective.

Strengths

Buyers of business consulting services in the Asia/Pacific region consider IBM to be among the most capable firms at helping them reduce costs, supporting business change across their organization, and understanding the unique needs of their business. IBM is perceived to be better than many firms at delivering value-creating innovation and at helping clients expand into new markets, manage risk, transform processes, and develop their digital capabilities.

Challenges

In terms of opportunities to improve perceptions in the region, IBM must focus on helping clients identify options for growth and improve operational efficiency, meeting project timelines and leveraging staff appropriately, and recommending change or innovation that produces results – all areas in which IBM is considered less capable than other firms.

KPMG

According to IDC analysis and buyer perception, KPMG is an IDC MarketScape Leader for business consulting in Asia/Pacific.

KPMG is a global network of member firms that provides audit, tax, and advisory services and operates in 155 countries, with more than 155,000 employees working in member firms around the world and serving many of the world's largest and most complex organizations.

Member firms are committed to helping clients transform their organizations, from improving performance to optimizing risk and from restructuring operations to seizing new challenges. KPMG offers clients industry-specific services to help enhance their financial performance and reporting, compliance, and value creation and supports three key client agendas: operational transformation, the evolving world of risk, and changes in public policy and regulation. KPMG professionals can provide value to clients with a keen ability to combine functional, operational, and technology consulting skills with deep experience in audit, risk, regulatory, tax, and M&A issues.

KPMG's business consultants provide services across industries, geographies, and functions, with particular strategic focus on industry-tailored solutions, notably in financial services, government and infrastructure, healthcare, diversified industrials, and energy/natural resources. KPMG believes that sustainable change must be understood and delivered in the context of a client's industry and has an explicit strategy of hiring experienced professionals from industry, in addition to other channels, to continue to deepen its industry expertise.

KPMG's global network continues to grow in the regions where clients are growing, including increasingly established high-growth markets such as China and the Middle East as well as Africa. To

better serve smaller markets, member firms are establishing regional hubs, such as the ASEAN Hub, that bring together regional specialists to help serve clients better.

KPMG member firms combine skills in functional, operational, and technology consulting with a history of more than a century of expertise in audit, risk, regulatory, tax, and M&A issues.

Management consulting is one of KPMG's eight strategic growth priorities and focuses on helping clients make better decisions, reduce costs, build more effective organizations, and develop appropriate technology strategies that address seven critical issues:

- Adapting to a changing world
- Efficiency and cost management
- Customer growth
- Embedding regulatory change
- Talent and human capital management
- Data and insight
- Technology

KPMG also delivers integrated strategies that help clients find ways to turn risk into an advantage through five primary areas of expertise:

- Accounting advisory services
- Financial risk management
- Forensic
- Internal audit, risk, and compliance
- IT advisory in risk consulting

KPMG member firms help clients shape their response to business opportunities and challenges across the business life cycle with deep technical specialization, global execution capabilities, and a sector-focused approach to market. KPMG's strategy of building long-term trusted advisor relationships with CEOs and C-level executives means the company can participate in strategic discussions about all potential transaction and restructuring opportunities.

KPMG captures innovation and learning from one part of the network and leverages it to deliver deep knowledge and expertise to client engagements through centers of excellence. Those centers focus on serving key client priority needs such as HR transformation, shared services and outsourcing advisory, CIO advisory, and strategic sourcing and procurement. KPMG also offers offshore services to assist with program management, process analysis and design, benchmarking, financial modeling, and IT delivery through KPMG Global Services.

KPMG member firms have developed an advisory framework around methodologies, tools, and language with its Value Delivery Framework (VDF) to ensure a disciplined and consistent approach to delivering services across practices, sectors, and geographies.

KPMG is aggressively growing its strategy, technology, data, and analytics capabilities, both organically and inorganically, with acquisitions including SECOR, Link Analytics, Cynergy, SAFIRA, SR7, and Momentum Partners.

Strengths

In the Asia/Pacific region, consulting clients view KPMG as the most capable firm at integrating appropriate analytics into an engagement. KPMG is also regarded in the region as being among the strongest at helping drive innovation through a client organization, maximizing project value, providing insights and competence and transferring knowledge to the client, and providing the necessary spectrum of services. In terms of high-level business objectives such as risk management, cost reduction, and process transformation, KPMG is seen as better than many of its peers.

Challenges

To advance in client estimation, KPMG must improve the perception among clients that it can effectively challenge corporate culture, integrate appropriate technologies to support its engagements, manage its staff turnover, and make recommendations for changes or innovations that produce results.

McKinsey

According to IDC analysis and buyer perception, McKinsey & Co. is an IDC MarketScope Major Player for business consulting in Asia/Pacific.

McKinsey is a globally recognized strategy consulting firm that was founded in 1926. McKinsey provides a combination of strategic and operations management services and has approximately 9,500 consultants in 107 offices across 61 countries. McKinsey defines its 8 core functional practices as business technology, corporate finance, marketing and sales, operations, organization, strategy, risk, and sustainability and resource productivity. The firm organizes by industry specializations across 22 industry areas. Additional capabilities include services that reinforce its core consulting work – advanced data and analytics, client learning, digital, implementation, and recovery and transformation services – as well as its Solutions suite of intuitive "actionable strategy" tools.

McKinsey is often recognized as a primary services provider among strategy firms. However, it is the firm's operations management consulting work that is growing as a result of client interest in the implementation of "actionable strategy." McKinsey responded to this demand with McKinsey Solutions. This group of services is based on the firm's most distinctive and "packageable" proprietary knowledge (i.e., services based on proprietary databases, models, tools, and insights). These packaged services typically include an online service delivery platform (software as a service), enabling clients to make informed business decisions on a variety of topics in different functions (e.g., pricing), sectors (e.g., banking), and regions (e.g., China). This globally operating group within the firm has a central hub in Europe (Louvain-la-Neuve, Brussels, Belgium) and a rapidly increasing presence in North America and India.

McKinsey serves numerous clients in the banking and financial services sectors. The Financial Services practice provides deep functional and regional expertise and capabilities that address

strategic needs for all types of financial service institutions, from small banks to large investment institutions. McKinsey's Branch Insights solution area provides retail banks with an online platform to track and manage branch performance, providing actionable change based on utilization metrics. Within its functional areas of expertise, McKinsey remains relevant with thought leadership and studies. For example, the McKinsey Global Institute is a business and economic think tank that aims to foster a deeper understanding of the global economy and its prospects for long-term growth. The Institute's fact base is designed to be a resource that helps contribute to decision making on management and policy issues. Recent McKinsey Global Institute thought pieces explore the need for increased productivity to increase long-term global growth, the regions and industries that offer the most promising opportunities to accelerate growth, and whether GDP is the best barometer by which to measure growth.

McKinsey's interest and insight into the complex social challenges that have a long-term impact on organizations resulted in the 2014 creation of the McKinsey Social Initiative, an independent nonprofit that strives to develop innovative approaches to complex issues. The Initiative's first program, Generation, was launched to improve employment prospects for young people by identifying areas with high demand for entry-level workers, developing and delivering skill-based training, and obtaining hiring commitments from corporate partners for graduates of the program. Through such offerings, McKinsey's guiding principle is to lead by example in the area of corporate social responsibility.

Established in 1964, *McKinsey Quarterly* remains the firm's flagship publication, defining and informing on the issues facing senior management across all industries. For example, McKinsey's focus on opportunities in emerging geographies is evident in an article in the December 2014 issue, which studies the family-run business factor in emerging economies. McKinsey reports that, as of 2010, family-led enterprises represented 60% of private sector companies. Therefore, understanding the dynamics of a family-run business is a critical long-term priority for global organizations with a presence in emerging market nations, as well as for would-be investors. Other thought pieces include integrating digital processes into a traditional organizational architecture, fostering women leaders and challenging the gender gap, and getting big impact from big data.

Strengths

Clients in the Asia/Pacific region consider McKinsey to be the most capable of all firms at helping them manage risk and drive innovation through their organization and evolve to include better use of digital capabilities. McKinsey is further perceived as the strongest at helping enterprises leverage talent and create a more effective business and among the best at helping clients expand into new markets and identify options for growth. On engagements, McKinsey teams are regarded as among the most capable in terms of integrating appropriate technologies and analytics and providing function or technical insights.

Challenges

Conversely, McKinsey is seen to need significant improvement in its abilities to provide high-quality service, understand the unique needs of a client's business, help reduce costs, and integrate the company's project teams with the client's.

PwC

According to IDC analysis and buyer perception, PricewaterhouseCoopers (PwC) is an IDC MarketScape Leader for business consulting in Asia/Pacific.

PwC is a Big Four global professional services organization established as a global network of member firms with more than 195,000 employees globally in 758 locations across 157 countries. PwC serves client organizations across all sectors and functional areas. PwC provides services through 3 divisions or "lines of service": assurance, tax, and advisory. The advisory business contains deals and consulting.

Consulting services covered within the scope of this IDC research include those provided with the following capabilities:

- Strategy
- Operations
- Finance
- People and organization
- Customer
- Technology
- Portfolio and program management
- Risk
- Forensics

PwC organizes its services and solutions into 24 industry sectors and brings together its functional and industry skills to focus on services important at the C-suite level.

Since 2007, PwC has been aggressively expanding its consulting business. PwC has particularly bolstered its consulting skills in strategy, operations, and technology to strengthen its ability to help clients with large-scale transformation from strategy through execution. This has been achieved via a combination of organic and inorganic investment.

PwC has completed a number of strategically noteworthy acquisitions, including the 2009 acquisition of significant portions of BearingPoint's U.S. Commercial and Financial Services units along with BearingPoint's global delivery centers in Bangalore (India) and Shanghai (China) and BearingPoint's Japan operations.

The 2010 acquisition of Diamond Management & Technology Consultants added Diamond's experienced strategy, technology, and management consulting professionals to PwC's Advisory practice, reflecting PwC's commitment to enhancing PwC's position as a professional services firm providing deep and extensive consulting capabilities to deliver a continuum of services from strategy through execution.

In 2011, PwC continued to invest in its strategy and operations capability, as evidenced by the acquisition of global management consulting firm PRTM Management Consulting. PRTM strengthened PwC's capabilities in operations management consulting, including strategy, supply chain, product development, customer service innovation, and business model innovation, supporting PwC's commitment to deliver consulting services from strategy through execution.

PwC complemented these with more focused acquisitions in the operations area in 2011, particularly S&V Management Consultants in Belgium and TrueEconomy in the Netherlands. In 2012 and 2013, PwC made a number of other focused acquisitions such as Ant's Eye View and BGT Partners in the United States and Logan Tod in the United Kingdom to add to its capabilities in social media strategy and digital marketing, better positioning PwC to serve companies looking to increase customer engagement.

In October 2013, PwC and Booz & Company announced that they had signed a conditional merger agreement. The deal was completed in April 2014, and the former Booz & Company entity has been renamed Strategy&. Together, PwC and Strategy& form a global advisory business that designs practical strategies for the world's top companies and can execute them across a wide range of functions and service offerings – turning ideas into action.

PwC's market approach is focused on industry and on being able to deliver value from strategy through execution, drawing on the broad range of both functional skills in the company's consulting business and capabilities in deals, tax, and assurance. PwC has implemented a model that facilitates the use of cross-border, cross-competency, and cross-line service teams to meet changing needs. For example, the network leverages resources in PwC's Financial Services and Public Sector practices to provide a depth of expertise and deeper value to clients in resolving issues that have become important during the global financial and economic crises, dealing both with risk and regulatory compliance and with new customer and growth strategies, including in emerging markets.

PwC actively competes for a broad range of services, in both the front office and the back office, by combining its industry and business knowledge with growing technology skills. PwC has made progress as a "full-service consulting firm," pulling resources and collective expertise from across all parts of the network.

Strengths

For clients in the Asia/Pacific region, PwC is the most capable of all firms at challenging corporate culture, delivering value-creating innovation, and directly improving the client's overall commercial performance. PwC teams are considered the strongest at meeting timelines and maximizing the value of a project, providing technical or industry insights and competence, and supporting business change across an organization. In addition, relative to its peers, PwC is seen as performing above average when it comes to helping clients manage risk, reduce costs, transform processes, and improve operational efficiency.

Challenges

To advance further in client perceptions, PwC must significantly improve on its abilities to manage consultant staff turnover during an engagement and to recommend change or innovation that produces results for the client.

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 the 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 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.

Priorities of Business Consulting Buyers/Consulting Buyer Perception as an Input

A significant and unique component of this evaluation is the inclusion of the perception of business consulting buyers of both the key characteristics and the capabilities of these consulting providers. This insight is captured in a broad-based random survey of consulting firm clients and reveals key insights regarding the capabilities of the individual firms.

The broad survey also provides key insights into the kinds of issues that enterprises are engaging consultants to help address. For several years, we have asked the respondents to rate the importance of 10 business issues – this year, we have added 3 more issues, all related to digital transformation: to evolve the business to include better use of digital capabilities to improve internal operations or to improve customer experience or to include more "digital" products and services (see Table 1). This research shows us the significant differences in how important "digital" is seen in the different regions. In Asia/Pacific, it is a top priority – with digital for customer experience being the single top business priority and digital for internal processes the third priority. In EMEA, digital internal processes are seen as quite important – priority number 4, while customer experience is only prioritized among the lowest. In Americas, most surprisingly, digital capabilities are seen as lowest priorities below all the "traditional" priorities. As an overarching business priority, creating digital products and services generally has a low priority in all regions primarily because it is far more applicable to some industries than others – where other uses of digital are more broadly applicable. If this dramatic difference in business priority is followed by investments, we are going to see Asia/Pacific taking a profound leap ahead of other regions and improve its competitive positioning in the worldwide economy.

Based on the other business issues, we find no dramatic changes from the previous year. Most important issues to address are still to reduce cost, to improve process efficiency, and to create a more effective business. These are top priorities for consulting buyers in the Americas and EMEA and very high priorities in Asia/Pacific. Identifying and implementing opportunities for growth has lower priority than the cost-focused issues. Thus the shift toward a more growth-oriented strategy has still not happened in a majority of companies in the Americas and EMEA, indicating that the volatile economy is still a barrier for many. But for many companies in Asia/Pacific, cost reductions are quite far down the priority list. These differences mean that consulting buyers will emphasize different qualities when selecting a consulting partner.

Regulatory compliance is another key issue – with increased importance in EMEA – showing that the consultant's local basis will be of high importance to the consulting buyers.

TABLE 1**Worldwide Enterprise Business Priorities by Region and Importance**

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

	Worldwide	Americas	EMEA	Asia/Pacific
Reduce costs	1	1	1	6
Improve operational efficiency	2	2	3	2
Create a more effective business	3	3	5	4
Identify and implement options for growth	4	4	6	5
Comply with new or existing regulations	5	5	2	8
Evolve the business to include better use of "digital" capabilities to improve internal operations	6	12	4	3
Manage risk	7	6	7	12
Transform critical processes	8	8	8	10
Evolve the business to include better use of "digital" capabilities to improve the customer experience	9	11	10	1
Leverage talent	10	7	9	11
Drive innovation	11	9	11	9
Evolve the business to include more "digital" products and services	12	13	12	7
Expand into new markets/geographies	13	10	13	13
n =	1,325	439	443	443

Source: IDC's *Worldwide Consulting Buyer Perception Survey*, 2014

Market Definition

Business consulting involves advisory and implementation services related to management issues. It often includes defining an organization's strategy and goals and designing and implementing the structures and processes that help the organization reach its goals. Business consulting includes three main areas: strategy consulting, operational improvement consulting, and change and organization consulting. The market is primarily served by four firm types:

- **Big Four:** IDC recognizes the well-known Big Four firms as the four largest international accountancy and professional services firms – Deloitte, EY, KPMG, and PwC.
- **Multidisciplinary:** IDC describes multidisciplinary firms as large, diversified consulting organizations that offer a range of business consulting services to clients across a myriad of sectors. To distinguish these from other specialty firms, services must address more than two business functional areas, in addition to providing strategy and operational implementations.
- **Technology led:** These are large, multifaceted firms and are known for deep expertise in both technology and business consulting. IDC identifies these firms as those that expanded from IT-centric business into more broad business consulting or vice versa.
- **Specialty:** Specialty firms have focused areas of consulting expertise in specific industries, functional areas, or technologies. Management and strategic consulting specialists that offer primarily strategy consulting and business intelligence (BI) models to specific sectors or industries including government fit into this category of firms.

Strategies and Capabilities Criteria

The importance of a firm's characteristics to project success and relevance of the particular issue combined with IDC's opinion about the impact those elements have on selection of firms implies a unique weighting of these elements when evaluating a firm's overall strategy and capability to address market opportunity and realizing market success (see Tables 2 and 3).

In addition to the criteria for success having varying weights, IDC believes the aggregate criteria (offering, go to market, and business) should also be weighted. Table 4 illustrates the relative weights used in this analysis.

Consequently, based on the weightings, we believe there are several criteria that are most influential in predicting vendor effectiveness on specific engagements:

- **Marketing strategy/capability:** Particularly important is the ability of the consultant to articulate its understanding of the key business issues of the day – those specific to the engagement under consideration, but also more generally. And those descriptions should reflect the unique criteria and characteristics of the issue that make it relevant in the context of the enterprise.
- **Offering delivered:** Strongly predictive of both vendor fit and fitness for a particular engagement are the recommendations delivered by functional and industry peers.
- **Growth strategy:** Consulting firms must be continuously assessing and improving their ability to provide relevant industry and technical insights and are typically rewarded for those insights with strong recommendations.

- **Delivery model execution:** To effectively deliver consulting projects, firms must strive to maximize their consulting team's ability to integrate with client management and functional teams, meet project timelines, and support change across the organization.

TABLE 2

Key Strategy Measures for Success: Business Consulting Services

Strategies Criteria	Criteria for Success	Subcriteria Weighting
Offering strategy	Current development of offerings will be relevant and attractive to customers over the next three to five years.	
Functionality or offering road map	A wide variety of approaches will be employed to ensure increased functional and industry capability, including strategic hiring and training. To ensure maximum impact, consulting firms will need to increase their ability to construct teams that leverage those capabilities and provide precise value to clients. To maintain alignment between offering and requirements, firms must commit to a robust process of uncovering unmet needs through external research, collaboration, and observing customer behavior.	1.0
Delivery model	Methodologies and tools are increasingly leveraged from a single, universally accessible source to ensure worldwide consistency. Tools will be sifted to include more data-based research applied to solutions. Clients will demand greater degree of knowledge transfer to ensure maximum ongoing value for the project. Also clients expect consultants to provide strong, "digitally enabled" solutions for complex problems.	3.0
Cost management strategy	While the target of most global consulting firms is very large enterprises, firms must also consistently engage with smaller firms to remain nimble and attentive to the cost of delivering services. Success in this approach will come from lowering acquisition costs for all clients, better leverage of both local and offshore resources, and closely managing the scope of projects to ensure the most focused delivery method appropriate to the client.	1.0
Portfolio strategy	To remain relevant, consulting firms will add capabilities to both high-demand services and those services that the consultant believes will become important. Consultants will also begin to incubate offerings that reflect the long-term direction of consulting — including increased use of risk awareness, risk integration, and analytics — and that reflect the ability of the consultant to challenge corporate culture.	3.0
Other offering strategies	Projects must increasingly include incorporating risk awareness into engagements in a proactive manner and being able to consistently deliver on the most important business issues — even if not the singular focus of a specific project.	2.0
Offering strategy total		10.0

TABLE 2

Key Strategy Measures for Success: Business Consulting Services

Strategies Criteria	Criteria for Success	Subcriteria Weighting
Go-to-market strategy	These strategies maximize the connection between offering and customers, including choosing to target customer segments that offer the greatest opportunity over the next three to five years.	
Sales/distribution strategy	Consulting models are becoming more complex. Enterprise buyers need to consume consultative services in increasingly diverse ways. While still dominant, traditional engagement models are being supplemented by "microsourcing" of technically complex but narrow tasks such as analytic processing or ongoing benchmarking and information services provided with less intensive "consultation" to support insourced analytical or benchmark operations.	2.0
Marketing strategy	Growth comes from many types of opportunities and client interactions, including temporal opportunities. Identifying areas of high demand and providing comprehensive and timely solutions require an integrated firmwide effort but will best serve the client's most important and immediate needs. In addition, enterprises must perceive consultant competence in key issues to gain permission to address specific client problems.	7.0
Customer service strategy	Even large enterprise clients are increasingly reliant on the Web to explore, evaluate, and even purchase consulting services and expect superior client relationship services. Consulting service delivery must evolve to include increased leverage of "digital" as a delivery channel.	1.0
Go-to-market strategy total		10.0
Business strategy	Strategies to grow the business are aligned with market trends and future opportunities over the next three to five years.	
Growth strategy	Firms poised for growth in the near term provide relevant specialized offerings that address specific needs, particularly for industries, geographic markets, or the size of the client. In addition, a consulting provider's ability to cultivate a wide range of referenceable clients ensures the provider's capabilities will get the widest exposure to opportunities. Growth strategy is measured by both the diversity of the planned dimensions of growth and the measure of enthusiasm of client recommendation across company size and functional areas.	6.0
Innovation/R&D pace and productivity	Firms must be able to deliver innovation to their clients, in terms of both leveraging existing experience for the unique benefit of a client and developing a truly unique approach to solutions. Delivery of innovation is measured by client perception of the innovation delivered on the project.	3.0

TABLE 2

Key Strategy Measures for Success: Business Consulting Services

Strategies Criteria	Criteria for Success	Subcriteria Weighting
Employee strategy	To maximize the ongoing capability of the consultant's employees, firms provide required training related to specific functional or technical areas and related to more broad-based consulting capabilities. The hours of required training demonstrate the commitment of the firm to specific, continuous improvement of its individual consultants.	1.0
Business strategy total		10.0

Source: IDC, 2015

TABLE 3

Key Capability Measures for Success: Business Consulting Services

Capabilities Criteria	Criteria for Success	Subcriteria Weighting
Offering capabilities	The offering's capabilities align well with current market needs and demands.	
Functionality/offering delivered	Offering capability is a combination of functional (domain) knowledge, industry insights, and technical capabilities. Higher capability reflects buyer perception of a firm's capability.	3.0
Delivery model appropriateness and execution	The appropriate delivery model must include an appropriate integration with the client team and meet client-developed project timelines. In addition, for consistent success, the consultant must drive and support a culture of change. Higher capability is reflected in higher buyer perception of a firm's capability in both the "ability to integrate with client team" and the "ability to meet project timelines" and "drive and support change across the organization."	3.0
Cost competitiveness	Cost competitiveness can best be measured by the ability to deliver financial benefits as a result of the project and directly improve client performance. Higher capability reflects buyer perception of a firm's capability.	1.0
Portfolio benefits delivered	Evolved consulting firms will necessarily be required to provide a full range of consulting services combined with an ability to provide specific insights related to industry, technical, or domain issues. Evolved consulting increasingly includes analytics or analytical components as a delivery tool and output of engagements. Higher capability reflects buyer perception of a firm's fullness and appropriateness of services offered and ability to integrate analytics into an engagement.	1.0

TABLE 3

Key Capability Measures for Success: Business Consulting Services

Capabilities Criteria	Criteria for Success	Subcriteria Weighting
Other offering capabilities	Consulting firms are continually introducing new service offerings. For high relevance, firms introduced a mix of both temporal and "foundational" offerings in the past years. Those services must be fluid enough to evolve additional needs or opportunities are discovered.	2.0
Offering capabilities total		10.0
Go-to-market capabilities	These capabilities maximize the connection between offerings and customers, such as delivery, partnerships, pricing, distribution, marketing, sales, and service.	
Sales/distribution structure, capabilities	Firms must operate by balancing both local and global requirements. Global presence indicates a firm's ability to respond and be relevant to cross-geographic issues. Higher capability reflects buyer perception of a firm's capability.	3.0
Marketing	The ability of a firm to connect to its clients' issues is essential to establishing a level of trust in the firm's ability to solve the problem. Issues are evaluated and weighted based on regional priorities. Higher capability reflects buyer perception of a firm's capability.	7.0
Go-to-market capabilities total		10.0
Business capabilities	Financial, employee, partner, and R&D management, among other capabilities, are in agreement with current market opportunities.	
Growth strategy execution	Essential to a consulting firm's growth is the firm's ability to develop "referenceable clients." Clients that strongly believe the firm will represent their best interests are most often referred. Growth strategy execution is measured by the degree of enthusiasm of industry-related recommendations by clients.	3.0
Employee management	In addition to "required training," the culture of continuous improvement in an organization can be reflected by training initiatives and the training's impact on the business. A higher score indicates a business impact of a recent training initiative.	1.0
Other business capabilities	Also essential to a consulting firm's growth is the firm's ability to develop "referenceable clients." Clients that strongly believe the firm will represent their best interests are most often referred. Business capabilities are measured by the degree of enthusiasm of recommendations by clients to enterprises of similar size.	6.0
Business capabilities total		10.0

Source: IDC, 2015

TABLE 4**Aggregate Criteria Weighting for Business Consulting Services**

	Weighting	
	Strategies Criteria	Capabilities Criteria
Offering	4.5	5.0
Go to market	3.0	3.0
Business	2.5	2.0
Total	10.0	10.0

Source: IDC, 2015

LEARN MORE**Related Research**

- *IDC MarketScape: Worldwide Business Consulting Services for the Banking Industry 2015 Vendor Assessment* (IDC Financial Insights #FI253532, January 2015)
- *IDC MarketScape: Worldwide Business Consulting Services for the Capital Markets Industry 2015 Vendor Assessment* (IDC #253549, January 2015)
- *IDC MarketScape: Worldwide Business Consulting Services for the Insurance Industry 2015 Vendor Assessment* (IDC #253461, January 2015)
- *Accenture Off to a Strong Start in FY15* (IDC #IcUS25358014, December 2014)
- *Worldwide and Regional Business Consulting 2013 Vendor Shares* (IDC #251468, September 2014)
- *IDC MarketScape: Worldwide Supply Chain Management Business Consulting Services 2014 Vendor Assessment* (IDC #250614, September 2014)
- *IDC MarketScape: Worldwide Finance and Accounting Consulting Services 2014 Vendor Assessment* (IDC #249540, July 2014)
- *IDC MarketScape: Worldwide Strategy Consulting Services 2014 Vendor Assessment* (IDC #249462, July 2014)
- *IDC MarketScape: Worldwide Enterprise Performance Management Business Consulting Services 2014 Vendor Assessment* (IDC #249463, July 2014)
- *IDC PeerScape: Critical Practices to Improve the People Dimension of Big Data and Analytics Projects* (IDC #249163, June 2014)

- *Worldwide and U.S. Business Consulting Services 2014-2018 Forecast: Realign for Growth* (IDC #247767, April 2014)
- *PwC and Booz & Company Finalize Merger: Announce the Creation of Strategy&* (IDC #247874, April 2014)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of a number of providers participating in the worldwide business consulting services market. The IDC MarketScape is an evaluation based on a comprehensive framework and a set of parameters that assesses providers relative to one another and to those factors expected to be most conducive to success in a given market during both the short term and the long term.

"While consulting providers are generally perceived as capable, buyers of consulting services are critical of consulting providers' ability to manage risk during the engagement – an essential component of many projects – and not as strong at helping evolve to use 'digital' approaches to improve products and services. In this research and others, we find that some vendors are better able to produce meaningful results than others." – Cushing Anderson, vice president, Business Consulting Services research

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 1000 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For more than 48 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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