New IDC MarketScape Evaluates Service Providers for EMEA Utilities

MILAN, February 23, 2017 — IDC Energy Insights today announced the release of a new study, IDC MarketScape: Service Providers for EMEA Utilities 2017 Vendor Assessment (IDC #EMEA41387516, February 2017), that evaluates service providers catering to the utilities industry across Europe, the Middle East, and Africa. The 14 vendors evaluated in the study are Accenture, Atos, Capgemini, CGI, Cognizant, Engineering, IBM, Indra, Infosys, NTT DATA, Sopra Steria, Tata Consultancy Services (TCS), Tieto, and Wipro.

The study provides utility companies, in both competitive and regulated sectors, with insight into the capabilities and strategies of service providers focusing on this industry. In summary, IDC Energy Insights sees that:

- The geographic footprint of vendors considered in this IDC MarketScape is not homogenous, with only a few truly pan-regional players. These vendors tend to have utilities practices with a long heritage and thousands-strong organizations of dedicated consultants and technologists.
- Most vendors analyzed have strong capabilities in IT consultancy, systems integration (SI), applications, and data transformation, albeit with varying delivery track records in the industry. By contrast, some have more developed capabilities to work with utilities lines of business (LOBs) than others, offering real-world expertise and some of the best business and technical talent available in the industry.
- Similarly, vendors tend to have varying degrees of specialization across subindustries, value chain segments, process, and functional domains. Only a handful of vendors offer a consistent pool of capabilities and proven ability to deliver large-scale transformation across the board.
- Most service providers double as solution providers to utilities somewhere along the value chain. Some have extensive portfolios of commercial off-the-shelf (COTS) software covering a very wide range of processes and functionality. However, top vendors tend to have a differentiating set of solutions, assets, and tools cutting across subindustries, the individual industry value chain, and the process map.
- Some of the vendors analyzed consistently feature among the industry's most innovative organizations. They have dedicated innovation networks and a comprehensive ecosystem of business and technology partners that help customers bridge the skill resource gap, lower technology risk and cost of ownership, and link to emerging innovation.

"As industry transformation accelerates across the region, utilities have to redesign parts of their organizations, transform their processes, and move to an IT landscape that is fit to support a digital business," said Roberta Bigliani, associate VP and head, IDC Energy Insights EMEA. "The days when utilities could expect to transform and innovate in isolation are long gone. Now more than ever, the challenges and opportunities facing the industry require a carefully selected ecosystem of partners to which technology and business service providers are quintessential. At the same time, with margins under pressure, the drive to extract value from technology service contracts has never been stronger."

For more information about this study, or to arrange a one-on-one briefing with IDC Energy Insights' analyst team, please contact Kanupriya at +44 20 8987 7100 or by email at kanupriya@idc.com. Studies are available to qualified members of the media. For information on purchasing studies, contact insights@idc.com ; reporters should email kanupriya@idc.com.

About IDC MarketScapes

IDC MarketScapes are the IT industry's premier vendor assessment tool, providing in-depth quantitative and qualitative technology market assessments of IT suppliers. IDC MarketScapes mitigate supplier risk by providing an accurate and consistent assessment of suppliers' characteristics, behavior, and capabilities.

About IDC Energy Insights

IDC Energy Insights assists energy businesses and IT leaders, as well as the suppliers that serve them, in making more effective technology decisions by providing accurate, timely, and insightful fact-based research and consulting services. Staffed by senior analysts with decades of industry experience, our global research analyzes and advises on business and technology issues facing the utility and oil and gas industries. International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology market. IDC is a subsidiary of IDG, the world's leading technology, media, research, and events company. For more information, please visit www.idc-ei.com, email info@idc-ei.com, or call 508-935-4400.

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