



New IDC MarketScape Evaluates Service Providers for Digital Grid Enablement in EMEA

LONDON, July 01, 2019 — With the energy transition, the continuous rise of renewable and distributed generation, and the decreasing costs of storage/batteries, electricity is becoming more pivotal. For instance, the uptake of electric vehicles (EVs) is increasingly electrifying transportation. This transformation is already creating new challenges for electric grids. Both transmission and distribution companies must revisit their business operations, enable new business models, act as market facilitators, and perhaps even introduce new tariff mechanisms.

The new [IDC MarketScape: EMEA Service Providers for Digital Grid Enablement 2019 Vendor Assessment](#) (IDC #EUR143345019, June 2019) assesses the capabilities and strategies of service vendors to support electricity companies in transforming and optimizing their grids (high, medium, and low voltage). IDC Energy Insights believes grid digital transformation is a must to handle the business needs of today and tomorrow. The report covers EMEA, and evaluates the following vendors: Accenture, Atos, Capgemini, CGI, Cognizant, IBM, Minsait (an Indra Company), NTT DATA, OMNETRIC (a Siemens Company), Siemens, and Wipro.

"The energy transition is already posing new challenges to grid operators," said [Roberta Bigliani](#), vice president, head of IDC Insights. "Transmission and distribution companies need to revisit their business operations, enable new business models, act as market facilitators, and perhaps bring in new tariff mechanisms. Grid digital transformation is a must in terms of handling current and future business needs. Key use cases will have to be implemented to manage predictive grids, integrated distributed energy, and strategic asset management."

Looking at the services vendor ecosystem, IDC Energy Insights highlights the following:

- The services vendor community is accelerating the development of specific capabilities to support digital grids. Vendor services in this domain often combine services with a wide variety of IP assets.
- Platform-based offerings are maturing and becoming a pillar of many vendors' value propositions. Cloud is becoming a strong enabler and is increasingly being considered by grid companies.
- To accelerate the deepening of competencies across operations technologies, some vendors considered in this IDC MarketScape have acquired and integrated specialized companies. They have formed strategic partnerships with energy technology

providers and, in some cases, service companies have leveraged the competencies of the engineering parts of their own group organizations.

- 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 to help their customers bridge the skills gap, lower technology risk and cost of ownership, and link to emerging innovation. This adds to solid thought leadership and a clear vision of the transformation of the electricity delivery ecosystem, both regionally and locally.
- Service pricing models are in constant evolution. The vast majority of vendors have introduced sophisticated performance-based pricing models with output- and outcome-based models. These are very slowly supplanting classic time-and-materials and fixed-price arrangements.

For more information about this study or to arrange a one-on-one briefing with an IDC Energy Insights analyst, please contact Kanupriya at +44-2089877111 or kanupriya@idc.com.

About IDC MarketScapes

The [IDC MarketScope](#) vendor analysis model is designed to provide an overview of the competitive fitness of IT, telecommunications, or industry-specific suppliers in a given market. The research methodology utilizes a rigorous scoring methodology based on both qualitative and quantitative criteria that results in a single graphical illustration of each vendor's position within a given market. IDC MarketScapes provide a clear framework in which the product and service offerings, capabilities and strategies, and current and future market success factors of IT, telecommunications, or industry-specific vendors can be meaningfully compared. The framework also provides technology buyers with a transparent foundation to enable companies to independently compare the strengths and weaknesses of current and prospective vendors.

About IDC Energy Insights

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