

IDC MarketScape: Worldwide Media Production, Distribution, and Monetization Integrated Cloud Solutions 2025 Vendor Assessment

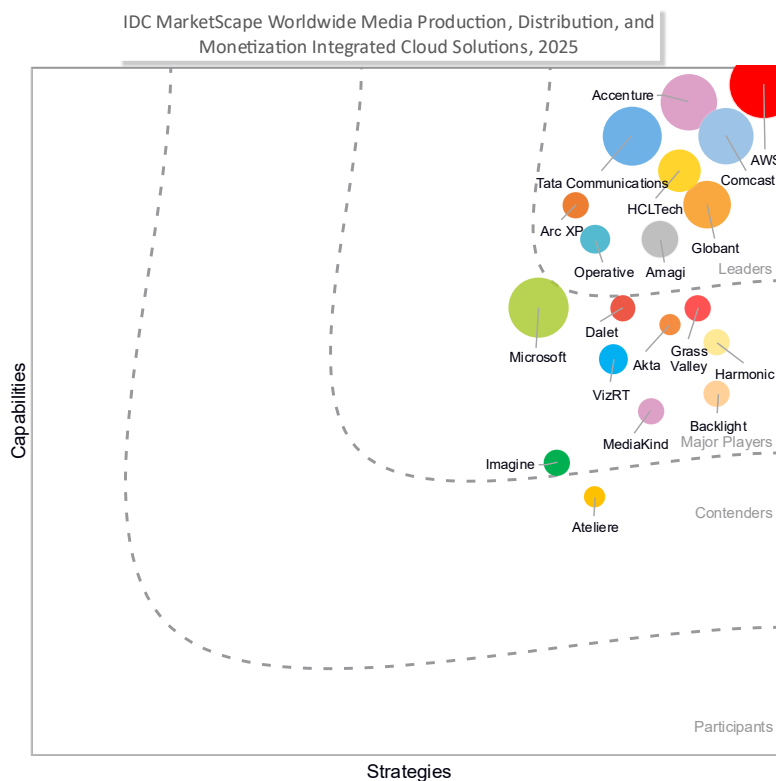
Alex Holtz

THIS EXCERPT FEATURES ACCENTURE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Media Production, Distribution, and Monetization Integrated Cloud Solutions Vendor Assessment



Source: IDC, 2025

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Media Production, Distribution, and Monetization Integrated Cloud Solutions 2025 Vendor Assessment (Doc # US52989125).

IDC OPINION

The native cloud-based unification of production, distribution, and monetization is reshaping the media industry in 2025 and is poised to accelerate further into 2026. This transformation is driven by the need for agility, scalability, and cost efficiency in an increasingly competitive and fragmented media landscape. Traditional media companies are evolving into "media-tech enterprises," leveraging cloud-native technologies to streamline operations, enhance collaboration, and unlock new revenue streams.

At the core of this shift is the integration of cloud-based workflows across the entire content life cycle — from creation to consumption. Cloud platforms enable real-time collaboration among geographically dispersed teams, allowing for faster content production and more efficient resource allocation. This is particularly valuable in a world where remote work and global content delivery are the norm. The scalability of cloud infrastructure allows media companies to dynamically adjust resources based on demand, reducing capital expenditures and shifting to a more flexible, pay-as-you-go model.

Distribution has also been revolutionized. Cloud-native systems support multiplatform delivery, ensuring content reaches audiences across streaming services, social media, and traditional broadcast channels with minimal latency. This unified approach enhances audience engagement through personalized content recommendations powered by artificial intelligence (AI) and machine learning, which are seamlessly integrated into cloud ecosystems.

Monetization strategies are evolving as well. Cloud platforms provide granular analytics and real-time data insights, enabling media companies to optimize ad placements, subscription models, and content licensing. This data-driven approach enhances revenue generation while improving user experience. Furthermore, the cloud facilitates rapid experimentation with new business models, such as microtransactions or tiered content access, without the need for significant infrastructure changes.

Overall, media companies in 2025 must navigate a complex landscape of rising costs, technological advancements, regulatory challenges, and shifting consumer preferences to remain competitive and sustainable. The worldwide media industry is undergoing a significant transformation driven by cloud technologies, data insights, and artificial intelligence. This transition is reshaping streaming turnkey solutions, unifying production, distribution, and monetization processes.

Media companies are leveraging cloud infrastructure to scale their operations efficiently, allowing for flexible storage, processing, and distribution of content, accommodating fluctuating demand and reducing costs. Cloud-based tools facilitate collaboration among geographically dispersed teams, enabling remote production and real-time editing. With the decline of third-party cookies, media companies are increasingly relying on first-party data to personalize content and enhance viewer engagement. AI-driven analytics are used to predict viewer preferences, optimize content recommendations, and improve advertising strategies.

AI technologies, including machine learning and natural language processing, are revolutionizing content creation by automating tasks such as video editing, content classification, and quality control. AI enables hyper-personalized viewing experiences by analyzing user behavior and preferences, leading to tailored content delivery. Turnkey solutions are integrating production, distribution, and monetization into single platforms, streamlining workflows and reducing operational complexity. Advanced AI and data analytics are enhancing monetization strategies through targeted advertising, subscription models, and dynamic pricing.

The continued convergence of AI, cloud, and edge computing is expected to deepen this transformation into 2026. Media companies that fully embrace cloud-native unification will be better positioned to innovate, respond to market shifts, and deliver compelling, personalized experiences at scale. The cloud is no longer just a tool; it is the foundation of the modern media enterprise.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

This IDC MarketScape for worldwide media production, distribution, and monetization integrated cloud solutions focuses on consultation, design and integration, project management and deployment, training, and cloud-based unified production, distribution, and monetization. The term *unified* is defined as a platform that provides a seamless process and application services across all three pillars of production (live and postproduction and playout), distribution (connected TV [CTV], mobile, and web), and monetization (advertising, subscription, and transactional services). The focus is on best practices in consultative services and strategic planning, design, integration, and the adoption and use of advanced technologies such as artificial intelligence or generative

AI (GenAI), agentic AI, AI agents, and data analysis and insights to provide real-time integration into business operations for intelligent decisioning as media companies drive toward profitability as their main focus. The coverage will be worldwide and only focuses on major market share technology vendors that offer solutions worldwide. Vertical markets served include broadcast television stations, networks, and media programmers for over-the-top (OTT) streaming services and distribution in addition to motion picture studios with direct-to-consumer business models.

Inclusion Criteria

- Any vendor participating in this IDC MarketScape should be able to showcase that it generates at least \$50 million in revenue annually for its M&E consultation, design and integration, project management and deployment, and cloud platform, applications, and services practice worldwide.
- A vendor should also be able to showcase that at least 10% of its services revenue and 10% of its resources belonging to its M&E cloud practice span across each of the three IDC defined macroregions namely Americas, EMEA, and APAC and achieved this in 2024 to demonstrate global scope.

ADVICE FOR TECHNOLOGY BUYERS

- Media companies should prioritize the integration of cloud-native solutions to streamline and unify production, distribution, and monetization processes, leveraging AI and automation to enhance operational efficiency and audience engagement.
- Media companies should engage with consultants, systems integrators, and technology vendors that understand the entire business cycle and use cases across business operations, media orchestration, production, distribution, and monetization.
- Media companies should also expect to partner with consultants, systems integrators, and technology vendors that have validated experience and the financial knowledge to develop a business plan focused on total cost of ownership, breakeven, and profitability objectives from initial concept ideation through solution deployment including road map enhancements through the introduction of AI and data insights throughout the business cycle for intelligent decisioning.
- Technology buyers should evaluate vendors based on their ability to provide end-to-end solutions that unify media workflows, ensuring compliance with data privacy regulations and offering robust security measures to protect content assets.

- Decision-makers should consider partnerships with vendors offering modular and scalable platforms that support hybrid and cloud-native environments, enabling seamless transitions from legacy systems and facilitating global content delivery.
- Industry leaders should focus on adopting advanced monetization strategies, such as dynamic ad insertion (DAI) and personalized content recommendations, to optimize revenue streams and improve viewer retention.

VENDOR SUMMARY PROFILE

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

After a thorough evaluation of Accenture, IDC has positioned the company in the Leaders category in this 2025 IDC MarketScape for worldwide media production, distribution, and monetization integrated cloud solutions.

Accenture delivers turnkey solutions tailored for media companies seeking to unify their production, distribution, and monetization efforts. These offerings are designed to help organizations stay ahead in a rapidly evolving media landscape shaped by shifting consumer behaviors, emerging technologies, and intensifying competition. By integrating advanced technologies with strategic consulting, Accenture empowers media enterprises to streamline operations, enhance audience engagement, and unlock new revenue opportunities.

In the realm of content production, Accenture enables media companies to modernize their workflows through cloud-based platforms that support remote collaboration and scalability. Their AI-driven content management systems (CMSs) automate key tasks such as tagging, editing, and metadata generation, significantly improving efficiency. These tools are embedded within end-to-end production workflows that seamlessly connect preproduction, postproduction, and asset management, ensuring a cohesive and agile content creation process.

For content distribution, Accenture offers intelligent solutions that ensure seamless delivery across multiple platforms. The Accenture Video Solution (AVS) is a modular system that handles content ingestion, encoding, packaging, and distribution to various endpoints including OTT services, smart TVs, and mobile apps. These capabilities are

underpinned by cloud-native infrastructure, enabling rapid deployment and global scalability to meet the demands of modern audiences.

Accenture's AMAP (Accenture Media and Advertising Platform) solution is gaining significant traction in 2025 as a cornerstone of the company's broader strategy to unify media production, distribution, and monetization through cloud-native, AI-enabled technologies. AMAP is designed to help media companies streamline operations, reduce costs, and unlock new revenue opportunities by integrating disparate systems into a single, cohesive platform.

One of the key advantages of AMAP is its end-to-end integration. It brings together content creation, rights management, ad sales, and audience analytics into a unified cloud environment. This eliminates the inefficiencies of siloed workflows and enables real-time collaboration across departments and geographies. For media companies, this means faster time to market for content, more agile campaign execution, and improved responsiveness to audience trends.

Another major benefit is data-driven monetization. AMAP leverages advanced analytics and AI to provide granular insights into audience behavior, content performance, and advertising effectiveness. This empowers media organizations to optimize pricing, personalize content delivery, and maximize ad revenue. With the rise of streaming and on-demand consumption, such capabilities are critical for staying competitive in a fragmented media landscape.

In addition, AMAP is built with scalability and flexibility in mind. As media companies expand globally or pivot to new business models, the platform can adapt without requiring major infrastructure overhauls. Its cloud-native architecture supports rapid deployment of new features and seamless integration with third-party tools, making it a future-proof investment.

Accenture's AVS and AMAP are complementary platforms designed to serve different but interconnected functions within the media and entertainment ecosystem. Together, they form a powerful, cloud-native foundation for media companies aiming to modernize their operations, enhance customer engagement, and maximize monetization.

Finally, Accenture offers strategic consulting and transformation services to guide media companies through digital evolution. This includes systems integration and cloud migration. These services position Accenture as a comprehensive partner for media companies.

Strengths

Accenture brings a combination of technological expertise, industry insight, and strategic vision to media companies seeking a unified, end-to-end turnkey solution that spans production, distribution, and monetization. The following are the key strengths that set Accenture apart in this space:

- **Deep industry expertise:** Accenture has decades of experience working with global media and entertainment companies. This gives the company a nuanced understanding of the industry's challenges, such as fragmented workflows, shifting consumer behaviors, and the need for rapid innovation. Its solutions are tailored to address these specific pain points.
- **Integrated end-to-end capabilities:** Accenture offers a seamless, unified approach that connects every stage of the media value chain, from production to monetization. Cloud-based tools and AI-powered content management streamline creation and collaboration during production. For distribution, scalable platforms like the Accenture Video Solution ensure efficient, multiplatform delivery. Finally, advanced analytics and flexible revenue models (AVOD, SVOD, free ad-supported streaming television [FAST]) help maximize returns during monetization.
- **Advanced technology and innovation:** Accenture leverages cutting-edge technologies such as artificial intelligence and machine learning for content tagging, personalization, and ad targeting; cloud-native infrastructure for scalability and agility; and data analytics for driving decision-making and optimizing performance across the content life cycle.
- **Scalable and modular solutions:** Accenture's platforms are designed to be modular and cloud native, allowing media companies to scale up or down based on demand. This flexibility is crucial in an industry where content consumption patterns can shift rapidly.
- **Strategic consulting and transformation support:** Beyond technology, Accenture provides strategic guidance to help media companies evolve into agile, software-driven organizations. This includes digital transformation road maps, organizational change management, and talent and capability development.
- **Proven track record:** Accenture has successfully delivered large-scale media transformation projects for some of the world's renowned broadcasters, studios, and streaming platforms. Its global delivery network and partnerships with notable cloud providers (such as Amazon Web Services [AWS], Microsoft Azure, and Google Cloud) enhance its execution capabilities.
- **Client outcomes and measurable impact:** Accenture's media clients have reported measurable outcomes following AMAP and AVS deployment, including

up to 30% faster time to market, 25% reduction in operational costs, and double-digit growth in ad revenue. These results demonstrate the platforms' effectiveness in driving efficiency, agility, and monetization across the media value chain.

Challenges

Accenture, while well positioned to support media companies with unified turnkey solutions, faces several key challenges when implementing end-to-end workflows that span production, distribution, and monetization. These challenges stem from both external industry dynamics and internal transformation complexities:

- **Fragmented media ecosystem:** The media landscape is increasingly fragmented due to the proliferation of streaming platforms, content formats, and distribution channels. This fragmentation makes it difficult to create a truly unified solution that works seamlessly across all platforms. Consumers often subscribe to multiple services, leading to content discovery fatigue and platform churn, which complicates monetization strategies.
- **Legacy infrastructure and silos:** Many traditional media companies still operate on outdated, siloed systems that are not easily integrated into modern, cloud-based workflows. Migrating these legacy systems to a unified, cloud-native architecture requires significant investment, change management, and technical expertise. Resistance to change and internal misalignment can slow down transformation efforts.
- **Competitive pressure:** Big tech companies are rapidly expanding their media footprints with vertically integrated platforms and massive data capabilities offering publishers full funnel performance management especially with connected TV. These players often outpace traditional media companies in innovation and monetization, making it essential for media companies to embrace innovation, which is an area where Accenture is already enabling transformation through its integrated platforms and strategic consulting.

Despite these challenges, Accenture's strength lies in the company's ability to combine strategic consulting, technology integration, and industry-specific expertise to help media companies navigate transformation.

Consider Accenture When

Media companies should consider partnering with Accenture for a unified turnkey solution when they are at key inflection points in their digital transformation journey. In the past, Accenture was a go-to consulting and media technology partner specifically for tier 1 clients. Now, it has structured innovative approaches to more effectively provide tier 2 and 3 media customers with end-to-end modular, lower-cost turnkey

solutions that fit within their budget. The following are notable strategic moments to engage Accenture:

- **When scaling or launching new digital platforms:** If a media company is planning to launch or expand an OTT streaming service or FAST channel, Accenture can provide the end-to-end infrastructure from content ingestion and management to multiplatform distribution and monetization. Its Accenture Video Solution is particularly valuable for rapid deployment and scalability.
- **When facing operational inefficiencies:** Companies struggling with disconnected production workflows, manual processes, or legacy systems can benefit from Accenture's cloud-native, AI-enhanced solutions. These tools streamline content creation, automate metadata tagging, and integrate production with distribution and monetization pipelines.
- **When monetization models need reinvention:** Accenture supports hybrid monetization strategies including AVOD, SVOD, and FAST with dedicated tooling and deployment support for FAST channel launches. The Accenture Video Solution enables rapid setup, scalable distribution, and monetization optimization for FAST services, helping media companies capitalize on emerging viewer trends and ad-supported models.
- **When strategic transformation is a priority:** If a media company is undergoing a digital transformation, restructuring, or M&A activity, Accenture's consulting and change management expertise can guide the transition. It helps align technology with business goals, upskill teams, and manage organizational change.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings,

customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed in this case being within the media and entertainment industry.

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 to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

This IDC MarketScape for worldwide media production, distribution, and monetization integrated cloud solutions focuses on consultation, design and integration, project management and deployment, training and, most important, the focus on cloud-based unified production, distribution, and monetization. The term *unified* is defined as a platform that provides a seamless process and application services across all three pillars of production (live and postproduction and playout), distribution (connected TV, mobile, and web), and monetization (advertising, subscription, and transactional services). The focus is on best practices in consultative services and strategic planning, design, integration, advanced technologies such as artificial intelligence (AI) or generative AI (GenAI), and data analysis and insights to provide real-time integration into business operations for intelligent decisioning to drive toward profitability. The coverage will be worldwide and only focuses on major market share technology vendors that offer solutions worldwide. Vertical markets served include broadcast television stations, networks, and media programmers for over-the-top (OTT) streaming services and distribution in addition to motion picture studios with direct-to-consumer business models.

LEARN MORE

Related Research

- *Managed Multicloud Best Practices, 2025* (IDC #US53386825, May 2025)

- *NAB 2025 Insights and Observations* (IDC #US52275425, April 2025)
- *IDC MaturityScape Benchmark: AI-Fueled Media and Entertainment Organization Worldwide, 2025* (IDC #US53283925, April 2025)
- *IDC MarketScape: Worldwide Connected TV Advertising Platforms 2025 Vendor Assessment* (IDC #US52039725, April 2025)
- *IDC's Worldwide Enterprise Infrastructure Tracker: Buyer and Cloud Deployment Taxonomy, 2025* (IDC #US53257425, March 2025)
- *IDC PlanScape: Industry Clouds* (IDC #US51722524, March 2025)
- *Worldwide Whole Cloud Forecast, 2025–2028* (IDC #US51736924, March 2025)
- *IDC FutureScape: Worldwide Media and Entertainment 2025 Predictions* (IDC #US51750324, October 2024)
- *Artificial Intelligence Impact on Media Business Cycle Flywheel* (IDC #US52520824, August 2024)

Synopsis

This IDC study evaluates vendors offering "unified" integrated cloud solutions for media production, distribution, and monetization by 2025. It highlights the challenges media companies face, such as achieving profitability, rising content costs, technological shifts, and regulatory pressures. The study emphasizes the importance of leveraging cloud infrastructure, AI, and data insights to streamline operations, enhance viewer engagement, and develop sustainable monetization models. Vendors are assessed based on their capabilities and strategies to address these evolving industry needs. Emphasis is placed on prioritizing the integration of cloud-native solutions to streamline and unify production, distribution, and monetization processes, leveraging AI and automation to enhance operational efficiency and audience engagement.

"Prioritizing the integration of cloud-native solutions to streamline and unify production, distribution, and monetization processes, leveraging AI and automation to enhance operational efficiency and audience engagement is a necessity to compete effectively especially when targeting financial objectives that are challenging in today's streaming world," stated Alex Holtz, research director, Worldwide Media and Entertainment Digital Strategies. "Setting expectations partnering with consultants, systems integrators, and technology vendors that have validated experience and the financial knowledge to develop a business plan focused on total cost of ownership, breakeven, and profitability objectives from initial concept ideation through solution deployment including road map enhancements through the introduction of AI and data insights throughout the business cycle for intelligent decisioning is paramount to success."

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. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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