



Analytics Business Process Services (BPS) – Analytics Goes Mainstream – Scope Expands Beyond Traditional Clients and Offerings

Market Report – March 2016 – Preview Deck

Our research offerings for global services

▶ Market Vista™

Global services tracking across functions, sourcing models, locations, and service providers – industry tracking reports also available

▶ BFSI¹ Information Technology

▶ PricePoint™

▶ BFSI¹ Business Process

▶ Finance & Accounting

▶ Healthcare & Life Sciences

▶ Procurement

▶ Application & Digital

▶ Human Resources

▶ Cloud & Infrastructure

▶ Recruitment & Talent Acquisition

▶ Global Sourcing

▶ Contact Center

▶ Locations Insider™

▶ Service Optimization Technologies

▶ Transaction Intelligence

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Subscription information

- This report is included in the following subscription(s)
 - **BFSI¹ Business Process, Finance & Accounting, Procurement**
 - **Human Resources, Recruitment & Talent Acquisition, Contact Center**
- In addition to published research, a subscription may include analyst inquiry, data cuts, and other services
- **If you want to learn whether your organization has a subscription agreement or request information on pricing and subscription options, please contact us**



Corporate Headquarters

Office: +1-214-451-3000

info@everestgrp.com



European Headquarters

Office: +44-207-129-1318

unitedkingdom@everestgrp.com

¹ Banking, financial services, and insurance

Background and scope of the research

Background of the research

- The global analytics BPS market grew at 35-40% in 2015, with tremendous interest in analytics having set the market on an accelerated growth path. 2015 witnessed buyers experimenting with advanced analytics solutions and technologies. The changing landscape of the buyer requirements had an impact on the solution characteristics that existed in the analytics BPS market – higher proportion of demand for advanced analytics, solutions for industries such as healthcare and hi-tech & telecom, and productized solutions

In this study, we investigate the state of Analytics BPS market. We focus on:

- Market size and buyer adoption
- Key emerging themes that are expected to drive the future growth in the Analytics BPS market
- Solution characteristics across scope, global sourcing, contracting model, and pricing structures
- Service provider landscape, which categorizes service providers as specialists or BPO players and covers their presence across various industries and geographies

Scope of study and sources of information

- Coverage across 15 analytics BPS service providers including Absolutdata, Accenture, Capgemini, Cognizant, EXL, Fractal Analytics, Genpact, HP, IBM, IGATE, Latentview, Minacs, TCS, Wipro and WNS

Table of contents (page 1 of 2)

Topic	Page no.
Scope of the study	5
Executive summary	6
• Summary of key messages	7
Section I: Market Overview	10
• Summary	11
• BPS market maturity	12
• Market size and growth	13
• Adoption trends by buyer geography	14
• Adoption trends by buyer industry	15
• Solution types and adoption	17
Section II: Key emerging themes	18
• Summary	20
• Big data analytics	21
• Service provider convergence	22
• Internet of Things (IoT)	23
• Productization	24
• Machine learning & automation	25
Section III: Solution characteristics	26
• Summary	27
• Process scope	28

Table of contents (page 2 of 2)

Topic	Page no.
Section III: Solution characteristics (continued)	26
• Global sourcing	29
• Pricing	30
• Engagement model	31
Section IV: Technology in analytics	32
• Summary	33
• Technology architecture & model	34
• Adoption trend for technology solutions	36
• Recent investments and acquisitions	37
Section V: Service provider landscape	39
• Summary	40
• Analytics BPS service provider landscape and focus areas	42
• Comparison between service providers	
– Geography focus	43
– Industry focus	44
– Technology mix	45
Appendix	46
• Glossary of terms	47
• References	48

Overview and abbreviated summary of key messages

(page 1 of 2)

This report provides comprehensive coverage of Analytics BPS market and analyzes it across various dimensions such as market overview, value proposition and key challenges, key emerging themes, solution characteristics, and service provider landscape

Some of the findings in this report, among others, are:

Market overview, value proposition, and key challenges

- Analytics BPS market is a US\$4.5 billion market, and is among the fastest growing markets clocking a 35-40% annual growth
- The market is dominated by North America but has witnessed rising interest from other markets such as continental Europe and Asia Pacific

Key emerging themes

- Analytics BPS market continues to evolve and in the next few years, the growth is expected to be driven by five themes – Big Data analytics, service provider convergence, Internet of Things (IoT), productization, and machine learning & automation

Value proposition and solution characteristics

- With increasing buyer maturity, the demand for advanced analytics solutions (predictive and prescriptive analytics) is bound to rise in the future
- India continues to be the most preferred delivery location for analytics services and has witnessed penetration by service providers in tier 2/3 locations

Overview and abbreviated summary of key messages

(page 2 of 2)

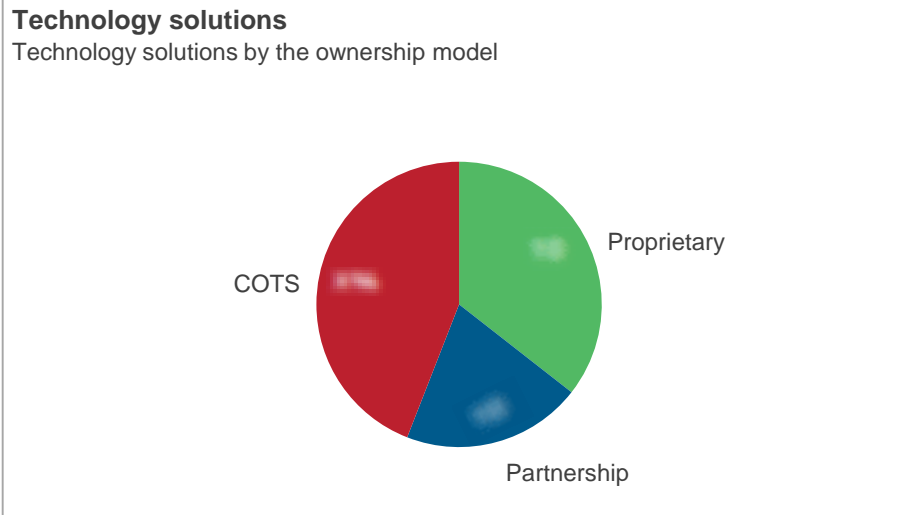
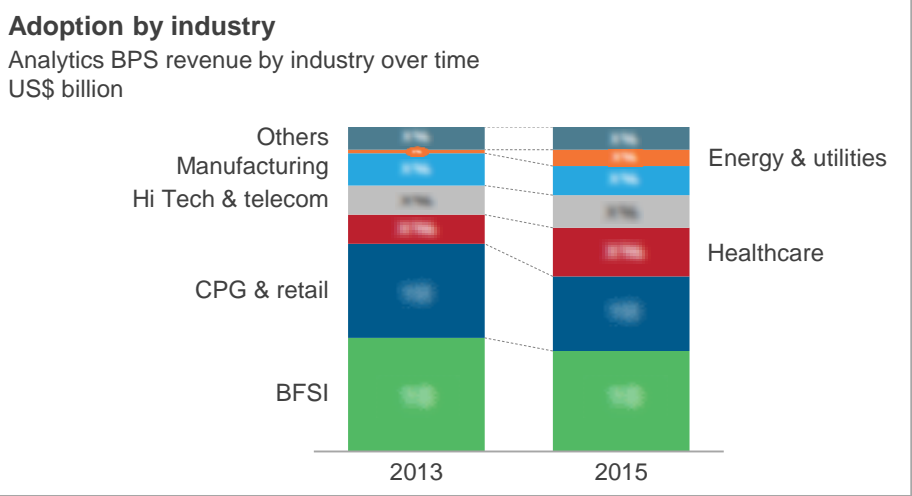
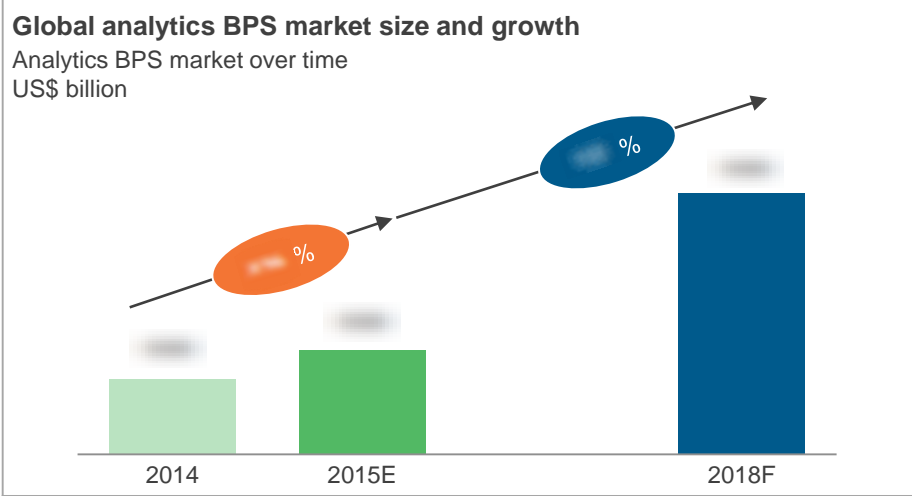
Technology landscape

- Significant interest in newer areas such as Big Data analytics and IoT will lead to huge demand for related tools and technologies in the future
- Most analytics service providers are technology-agnostic and have capabilities in multiple Commercial Off-the-Shelf (COTS) tools. However, many have made dedicated investments in the last couple of years to build a suite of proprietary analytics tools

Service provider landscape

- Only a few of the global service providers have meaningful presence in the emerging geographies of Europe, Middle East & Africa and Asia Pacific
- While there are service providers who have a diverse industry portfolio, many still continue to be heavily focused on one/two specific industries

This study offers five distinct chapters providing a deep dive into key aspects of the Analytics BPS market; below are four charts to illustrate the depth of the report



Service provider landscape

Areas of focus within the analytics BPS market for various service providers

Service provider	Industry			
	Industry - 1	Industry - 2	Industry - 3	Industry - 4
Service provider - 1		✓	✓	
Service provider - 2	✓	✓		
Service provider - 3			✓	
Service provider - 4	✓			✓
Service provider - 5	✓			✓
Service provider - 6	✓	✓		
Service provider - 7	✓	✓		✓
Service provider - 8		✓	✓	
Service provider - 9	✓	✓		✓
Service provider - 10	✓	✓	✓	
Service provider - 11	✓	✓		
Service provider - 12			✓	
Service provider - 13	✓	✓	✓	
Service provider - 14	✓			✓

Source: Everest Group (2016)

Additional analytics-focused research references

The following documents are recommended for additional insight on the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

1. **Creating Value through Analytics in HR** ([EGR-2013-3-R-0930](#)); 2013. This report examines the role of analytics in HR and identifies the ways to capture its value within an outsourcing construct
2. **Analytics in Banking – War is Ninety Percent Information** ([EGR-2013-11-R-0888](#)); 2013. This report provides a comprehensive understanding of the analytics services industry with focus on banking domain. Analytics adoption in the banking industry is covered in depth, exploring various aspects such as market size, key drivers, recent analytics initiatives, and challenges. The report also analyses the trends in analytics deals for various banking subverticals (cards, retail, commercial, and lending) and evaluates analytics capabilities of 20+ service providers in the banking space

For more information on this and other research published by Everest Group, please contact us:

Rajesh Ranjan, Partner:
Anupam Jain, Practice Director:
Vishal Gupta, Senior Analyst:
Saurabh Verma, Senior Analyst:
Sharang Sharma, Analyst:
BPS Team:

rajesh.ranjan@everestgrp.com
anupam.jain@everestgrp.com
vishal.gupta@everestgrp.com
saurabh.verma@everestgrp.com
sharang.sharma@everestgrp.com
bpsteam@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



From **insight** to **action**.



About Everest Group

Everest Group is a consulting and research firm focused on strategic IT, business services, and sourcing. We are trusted advisors to senior executives of leading enterprises, providers, and investors. Our firm helps clients improve operational and financial performance through a hands-on process that supports them in making well-informed decisions that deliver high-impact results and achieve sustained value. Our insight and guidance empowers clients to improve organizational efficiency, effectiveness, agility, and responsiveness. What sets Everest Group apart is the integration of deep sourcing knowledge, problem-solving skills and original research. Details and in-depth content are available at www.everestgrp.com and research.everestgrp.com.

Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-647-557-3475

London

unitedkingdom@everestgrp.com
+44-207-129-1318

Delhi

india@everestgrp.com
+91-124-284-1000

Stay connected

Websites

www.everestgrp.com
research.everestgrp.com



Twitter

@EverestGroup



Blog

www.sherpasinblueshirts.com

SHERPAS
IN BLUE SHIRTS