



Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2016

Market Report – April 2016 – Preview Deck

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¹ Banking, financial services, and insurance

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Background and methodology of the research

Background of the research

The global Analytics BPS market continues to grow at a fast pace. It registered a 35-40% growth in terms of revenue in 2015, reaching a global market size of around of US\$4.5 billion. The market continues to be dominated by North America, which accounts for almost two-thirds of the global revenue, while Asia Pacific and Continental Europe continue to be among the fastest growing regions. IBM, Accenture, and TCS dominate the global Analytics BPS market and are major players across most of the geographies.

With evolving buyer demands, the scope of contracts is expanding beyond reporting and moving from descriptive to predictive and prescriptive analytics. Enterprises have become more inclined to have analytics as an integral part of business functions, which was previously being offered and consumed as a standalone service. Big Data analytics, Internet of Things (IoT), and productization are expected to drive the momentum in the future.

With increasing adoption, impact of technology, and an outcome-oriented approach, Analytics BPS is expected to evolve rapidly in terms of scale, scope, and cost efficiency.

Scope and methodology


In this research, we analyze the global Analytics BPS service provider landscape. We focus on:

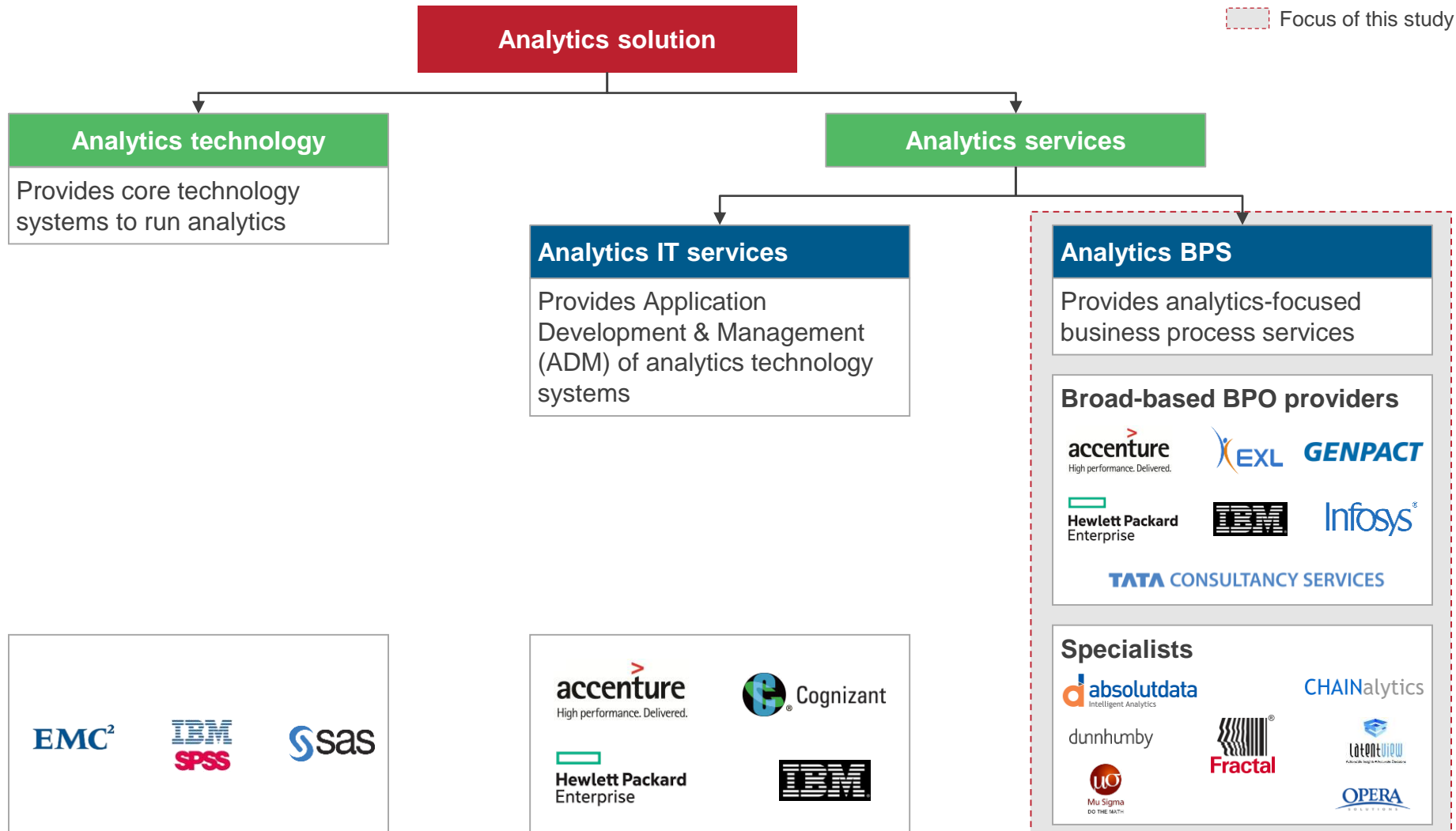
- Relative positioning of 18 service providers on Everest Group's PEAK Matrix for Analytics BPS
- Service provider market success
- Service provider capability assessment across key dimensions
- Comments about service providers

Scope of the study

This study focuses on the BPS aspect of an analytics solution

ILLUSTRATIVE

 Focus of this study



Overview and abbreviated summary of key messages

Analytics continues to grow and expand its scope with more clients deriving value from it and drawing useful strategic insights. This report uses Everest Group's proprietary PEAK Matrix to assess and rate service providers on various dimensions of their capabilities. It also includes market share analysis of service providers and Everest Group's remarks on service providers highlighting their key strengths and development areas

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

Everest Group PEAK Matrix for Analytics BPS

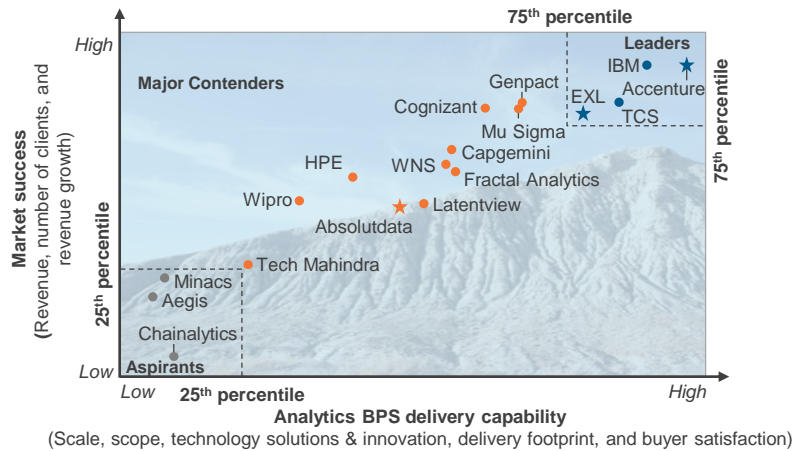
- Everest Group classifies 18 Analytics BPS service providers on Everest Group Performance | Experience | Ability | Knowledge (PEAK) Matrix into the three categories of Leaders, Major Contenders, and Aspirants
- Accenture, EXL, IBM, and TCS emerged as Leaders
- Absolutdata, Capgemini, Cognizant, Fractal Analytics, Genpact, HPE, Latentview, Mu Sigma, Tech Mahindra, Wipro, and WNS emerged as Major Contenders
- Aegis, Chainalytics, and Minacs are Aspirants on the PEAK Matrix for Analytics BPS
- Absolutdata, Accenture, and EXL have been identified as "Star Performers" on the Analytics BPS PEAK Matrix, based on their strong performance during the last 12-18 months ended June 2015

Key insights on Analytics BPS market shares

- IBM, Accenture, and TCS are the top three largest analytics BPS service providers by revenue
- Accenture, IBM, and Cognizant account for over 50% of the Analytics BPS clients
- Accenture, IBM and TCS have a dominating presence across major geographies
- While predictive and prescriptive analytics account for only a third of all FTEs, they contribute to almost half of the overall revenue

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

Analytics BPS PEAK Matrix



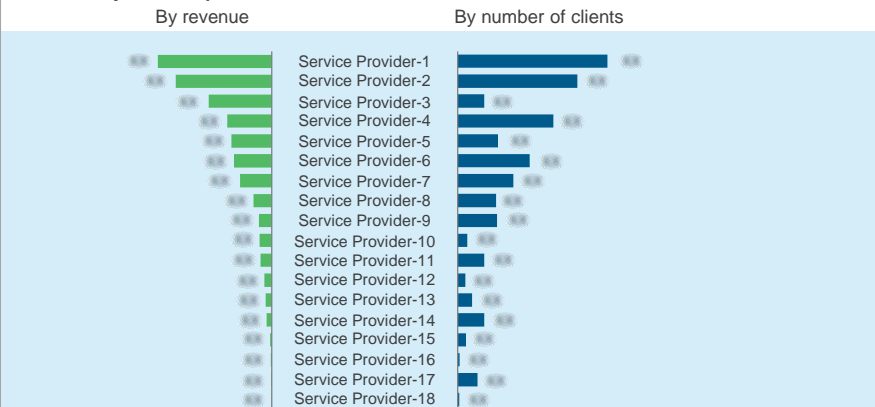
Capability assessment

Measure of capability: ● Best-in-class ● Very high ● High ● Medium high ● Medium ● Medium low ● Low ● Not mature

Service provider	Delivery capability						Market success
	Scale	Scope	Technology capability & innovation	Delivery footprint	Buyer satisfaction	Overall	
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	●	●	●	●	●	●	●
Service Provider-15	●	●	●	●	●	●	●
Service Provider-16	●	●	●	●	●	●	●
Service Provider-17	●	●	●	●	●	●	●
Service Provider-18	●	●	●	●	●	●	●

Market success

Global Analytics BPS provider market share



Everest Group's remarks on service providers

Provider	Strengths	Areas of improvement
Service provider 1	<ul style="list-style-type: none"> Though XYZ experienced limited translation of its potential into market success, it has strengthened its capabilities in analytics BPS It is a specialist in analytics and has a very focused approach. Most of its business comes from manufacturing and CPG & retail. This focus is the foundation stone for establishing itself as an expert in these industries It has very good coverage of processes ranging from reporting and descriptive to predictive and prescriptive analytics. High focus on developing its capabilities around advanced analytics is the key differentiator 	<ul style="list-style-type: none"> It needs to leverage its strengthening expertise in manufacturing and CPG & retail beyond the North America market and should explore other potential geographies Being a specialist puts it in direct competition with some of the other specialists who have more evolved technology-led offerings in their arsenal. It needs to develop more number of proprietary tools and solutions to gain traction Developments around machine learning and IoT are paving the way for cutting edge analytics. It needs to develop capability in these areas to gain prominence in this rapidly evolving market
Service provider 2	<ul style="list-style-type: none"> XYZ has emerged as a Major Contender on the Everest Analytics BPS PEAK Matrix driven by strong revenue growth in conjunction with good delivery capabilities spread across both low-cost and high-cost regions It has a number of technology solutions, developed both in-house and in partnership with third party clients, which has allowed it to offer more robust offerings to clients Its industry specific expertise, as well as its flexibility in managing/handling issues are counted among its key strengths by clients 	<ul style="list-style-type: none"> Most of its revenue is derived from mature markets such as North America and Europe. It should look towards expanding its business in emerging geographies such as Latin America and Asia Pacific to fuel further growth BFSI and healthcare account for almost two-thirds of XYZ's portfolio. It should expand in other industries to further leverage its capabilities Interviewed buyers expect XYZ to improve capabilities in advanced analytics to be able to offer a complete package to them

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. **Analytics Business Process Services (BPS) – Analytics Goes Mainstream – Scope Expands Beyond Traditional Clients and Offerings** ([EGR-2016-10-R-1721](#)); 2016. This report provides comprehensive coverage of the global Analytics BPS market including detailed analysis of market size and growth, buyer adoption trends, key emerging themes, technology in analytics, and solution characteristics, and service provider landscape
2. **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
3. **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

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