Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2017

Business Process Services (BPS)
Market Report – May 2017 – 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

▶ Application Services

▶ BPS | Banking Financial Services

▶ BPS | Healthcare & Life Sciences

▶ BPS | Insurance

▶ Catalyst™

▶ Cloud & Infrastructure

▶ Contact Center

▶ Digital Services

▶ Finance & Accounting

▶ Human Resources

▶ ITS | BFSI*

▶ ITS | Healthcare & Life Sciences

▶ IT Services Forecaster™

▶ Locations Insider™

▶ PricePoint™

▶ Procurement

▶ Recruitment & Talent Acquisition

▶ 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

Corporate Headquarters
Office: +1-214-451-3000
info@everestgrp.com

European Headquarters
Office: +44-207-129-1318
unitedkingdom@everestgrp.com

Delhi Office
Office: +91-124-284-1000
india@everestgrp.com

Subscription information

- This full report is included in the following subscription(s)
  - **BFS BPS, HLS BPS, FAO, HRO, Insurance BPS, PO, RTA**
- 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**

* Banking, financial services, and insurance

Everest Group RESEARCH

Table of contents

Everest Group
R E S E A R C H

Table of contents

Everest Group
RESEARCH

Background and methodology of the research

Background of the research

With rising worldwide demand, the global analytics BPS market managed to clock an annual growth rate of more than 20% in 2016. The market has seen a shift in the way buyers now approach analytics. Rather than implementing piece-meal solutions, clients are increasingly looking at enterprise-wide solutions to get a full picture of the entire business and gain greater insights by leveraging data from multiple departments/sources.

North America continues to be the largest consumer of these services, followed by UK and Europe. There is demand seen from emerging geographies such as Asia Pacific and Middle East. However, these geographies are still behind on the maturity curve compared to developed markets, where the focus has now shifted to advanced analytics. Accenture, Genpact, IBM, and TCS dominate the global analytics BPS market in terms of market share and are major players across most of the geographies.

Enterprises are now looking at having one or two key strategic vendors rather than multiple vendors to manage their company-wide analytics, for more efficient and smoother functioning, as well as cross-functional analytics within the firm to drive better insights. Traditionally playing in the data management and reporting space, the broader BPO firms have invested significantly in strengthening their capabilities in the advanced analytics space, giving a tough competition to the analytics specialists. Going forward, the market is expected to become even more competitive with both BPO firms and analytics specialists offering entire spectrum of analytics services. Therefore to stay competitive in the market, service providers need to innovate by investing in emerging areas such as big data analytics, Internet of Things (IoT), and productization solutions.

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

Everest Group
RESEARCH

This report is based on three key sources of proprietary information

1

- Proprietary database of **15+ analytics BPS service providers** (updated annually)
- The database tracks the following elements for each service provider:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by different Lines of Business (LoBs) and processes
  - Revenue split by region
  - Location and size of delivery centers
  - Technology solutions developed

2

- **Service provider briefings**
  - Vision and strategy
  - Annual performance and future outlook
  - Key strengths and improvement areas
  - Emerging areas of investment

3

- **Ongoing buyer surveys and interactions**
  - Drivers and challenges for adopting analytics BPS
  - Emerging priorities
  - Lessons learnt and best practices
  - Detailed assessment of service provider performance across different elements, such as:
    - Performance against key analytics BPS metrics
    - Performance across various analytics BPS processes
    - Performance during the implementation and transition phases
    - Governance and relationship management

List of service providers covered in the analysis

absolutdata Intelligent Analytics   accenture High performance. Delivered.   AEGIS Experience. We make it easy.

BRIDGE i2i INFORMATION · INSIGHT · IMPACT   Capgemini CONSULTING.TECHNOLOGY.OUTSOURCING   Cognizant

EXL   Fractal   GENPACT

IBM   Infosys   Mu Sigma DO THE MATH   LatentView Actionable Insights ● Accurate Decisions

NTT DATA   TATA CONSULTANCY SERVICES

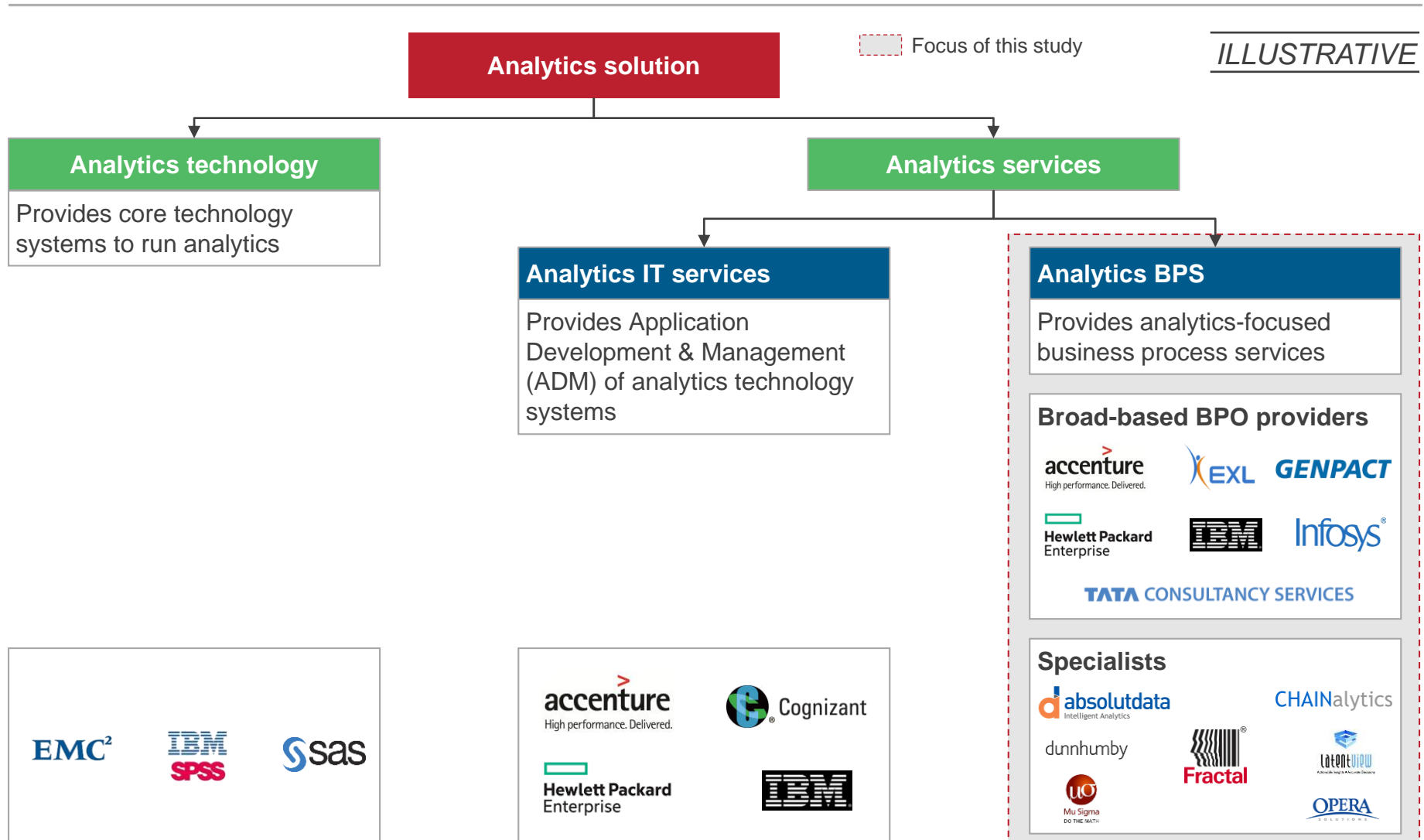Tech Mahindra   WIPRO Applying Thought   WNS Extending Your Enterprise

Note: Assessment for Absolutdata, Latentview, and Mu Sigma excludes service provider inputs on this particular study, and is based on Everest Group's estimates which leverage Everest Group's proprietary Transaction Intelligence (TI) database, service providers' ongoing coverage & public disclosures, and interaction with buyers

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected, will only be presented back to the industry in an aggregated fashion

Scope of the study
This study focuses on the BPS aspect of an analytics solution

ILLUSTRATIVE

Focus of this study

Analytics solution

Analytics technology

Provides core technology systems to run analytics

Analytics services

Analytics IT services

Provides Application Development & Management (ADM) of analytics technology systems

Analytics BPS

Provides analytics-focused business process services

Broad-based BPO providers

accenture — High performance. Delivered.
EXL
GENPACT
Hewlett Packard Enterprise
IBM
Infosys
TATA CONSULTANCY SERVICES

Specialists

absolutdata — Intelligent Analytics
CHAINalytics
dunnhumby
Fractal
LatentView
Mu Sigma — DO THE MATH
OPERA SOLUTIONS

EMC²
IBM SPSS
SAS

accenture — High performance. Delivered.
Cognizant
Hewlett Packard Enterprise
IBM

Everest Group
RESEARCH

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:

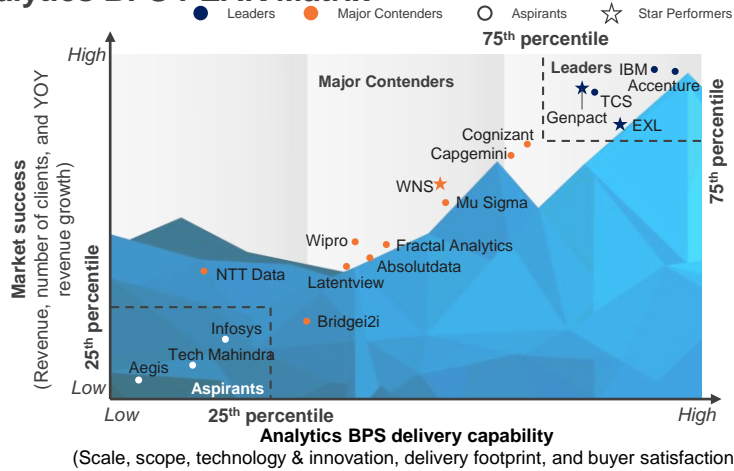**Everest Group PEAK Matrix for Analytics BPS**

- 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, Genpact, IBM, and TCS emerged as Leaders
- Absolutdata, Bridgei2i, Capgemini, Cognizant, Fractal Analytics, Latentview, Mu Sigma, NTT Data, Wipro, and WNS emerged as Major Contenders
- Aegis, Infosys, and Tech Mahindra are Aspirants on the PEAK Matrix for Analytics BPS
- EXL, Genpact, and WNS 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 2016

Key insights on Analytics BPS market shares

- Accenture, Genpact, IBM, and TCS are the leading analytics BPS service providers by revenue
- Given the large market size and appreciable growth rate, a lot of service providers tend to focus on the North American market over other geographies, which has resulted in a very competitive service provider landscape
- Accenture, Genpact, IBM, and TCS are among the largest players in leading industries such as manufacturing, BFSI, CPG & retail, and telecom

Everest Group
RESEARCH

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

Leaders ●   Major Contenders ●   Aspirants ○   Star Performers ☆

High

Market success (Revenue, number of clients, and YOY revenue growth)

75th percentile

Major Contenders

Leaders
- IBM
- Accenture
- TCS
- Genpact
- EXL
- Cognizant
- Capgemini
- WNS ★
- Mu Sigma
- Wipro
- Fractal Analytics
- Absoludata
- NTT Data
- Latentview
- Bridgei2i
- Infosys
- Tech Mahindra
- Aegis

Aspirants

25th percentile   75th percentile

Low   Low   High

Analytics BPS delivery capability
(Scale, scope, technology & innovation, delivery footprint, and buyer satisfaction)

Capability assessment

Best in Class ●   Very High ◕   High ◕   Medium High ◑   Medium ◑   Medium Low ◔   Low ◔   Not Matured ○

| Service provider | Delivery capability | | | | | | Market success |
	Scale	Scope	Technology solutions & innovation	Delivery footprint	Buyer satisfaction	Overall	
Service provider 1	◑	●	●	●	◕	◕	●
Service provider 2	◑	◑	●	●	●	◕	◕
Service provider 3	◕	◕	●	◑	●	●	●
Service provider 4	◑	●	●	●	◑	◕	●
Service provider 5	◕	●	◕	◑	●	◕	◕

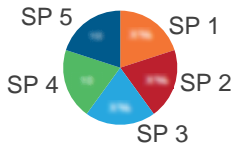## Market success

Analytics BPS market share by signing regions
Revenue in US$ million

SP: Service Provider

North America
SP 5, SP 1, SP 4, SP 2, SP 3

United Kingdom
SP 5, SP 1, SP 4, SP 2, SP 3
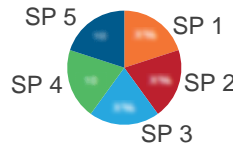
Rest of EMEA
SP 5, SP 1, SP 4, SP 2, SP 3
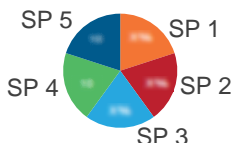
Emerging markets (Asia Pacific and Latin America)
SP 5, SP 1, SP 4, SP 2, SP 3
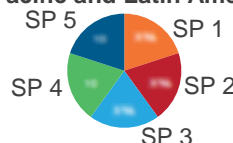
Everest Group's remarks on service providers

Best in Class ●   Very High ◕   High ◕   Medium High ◑   Medium ◑   Medium Low ◔   Low ◔   Not Matured ○

| Delivery capability | | | | | | Market success |
Scale	Scope	Technology solutions & innovation	Delivery footprint	Buyer satisfaction	Overall	
◕	◕	◑	◑	◑	●	◔

Strengths

Areas of improvement

Everest Group RESEARCH

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. **Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2016** (EGR-2016-10-R-1751); 2016. This report provides insights into the global analytics business process services (BPS) market and examines the service provider landscape and its impact on the market. It focuses on service provider position & growth in the market, changing market dynamics & emerging service provider trends, and assessment of service provider delivery capabilities

3. **Analytics Business Process Services (BPS) – Service Provider Compendium 2016** (EGR-2016-10-R-1806); 2016. The Analytics BPS service provider compendium provides accurate, comprehensive, and fact-based snapshots of 16 service providers in the Analytics BPS market. The study provides a detailed five-page profile of each Analytics BPS service provider assessed, which captures a comprehensive picture of their scale of operations, recent developments & investments, technology solutions, and delivery locations

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

Anupam Jain, Practice Director: anupam.jain@everestgrp.com
Vishal Gupta, Senior Analyst: vishal.gupta@everestgrp.com
Sharang Sharma, Senior Analyst: sharang.sharma@everestgrp.com
BPS Team: bpsteam@everestgrp.com

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

Everest Group
RESEARCH

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.

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-804-276-4533

Delhi
india@everestgrp.com
+91-124-496-1000

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

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

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

Stay connected

Website

www.everestgrp.com

Social Media

@EverestGroup

@Everest Group

Blog

Sherpas In Blue Shirts

www.sherpasinblueshirts.com