



Analytics Business Process Services (BPS) – Analytics Disrupting Traditional Decision Making for Businesses – The Quest for More Continues

Annual Report – July 2017 – Preview Deck

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Background and scope of the research

Background of the research

Witnessing a robust annual growth of 25-28% over 2014-16, the global analytics BPS reached a market size of over US\$5 billion at the end of 2016. The last 12-18 months have witnessed evolving buyers demanding for end-to-end analytics solutions and technologies with the flexibility to choose amongst multiple options that can allow them to derive better and actionable insights in real-time. The changing demand of buyers and intensifying competition in the market is causing a shift in the analytics solutions offered – from standalone analytics solutions to enterprise-wide solutions and integration of basic as well as advanced solutions

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

- Key emerging themes that are expected to drive the future growth in the analytics BPS market
- Market maturity and size by geography and industry
- Buyer adoption and changing buyer requirements
- Solution characteristics across scope, global sourcing, pricing structures, and engagement models
- 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, Aegis, Accenture, Bridgei2i, Capgemini, Cognizant, EXL, Fractal Analytics, Genpact, IBM, Infosys, Latentview, NTT Data, TCS, Tech Mahindra, Wipro, and WNS

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Overview and abbreviated summary of key messages

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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\$5 billion market, and is among the fastest growing markets, clocking an annual growth of 22-25%
- While North America continues to be a key buyer geography driven by adoption in the U.S., UK has quickly ramped-up the use of analytics
- BFSI and CPG & retail are the leading adopters of analytics BPS; healthcare, energy & utilities, hi-tech & telecom, and government, have also witnessed robust growth in the last 12-18 months

Key emerging themes

- Analytics BPS market continues to evolve and in the next few years, the growth is expected to be centered around these key six themes – analytics driving digital revolution, service provider convergence, sophisticated analytics skills, enterprise wide analytics solutions, productization of analytics, and integration of IoT and AI with analytics products

Value proposition and solution characteristics

- With increasing buyer maturity and competition in the market, service providers are increasingly offering advanced analytics solutions (predictive and prescriptive analytics)
- 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

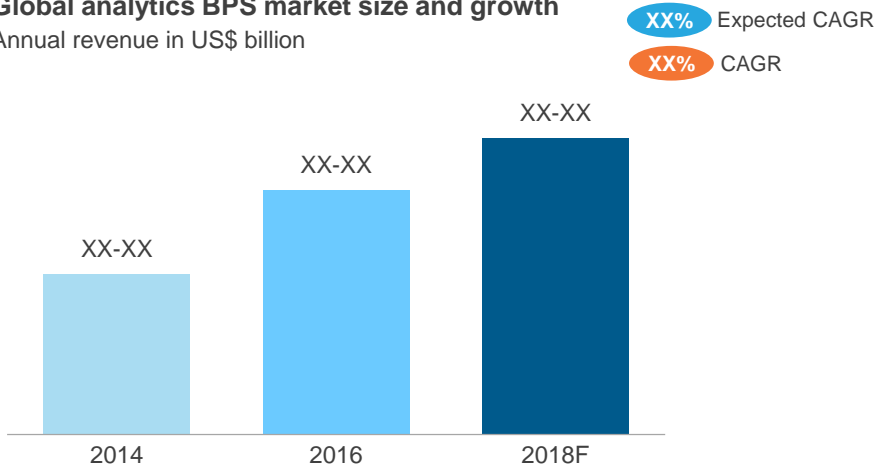
- Significant interest in newer areas such as IoT and AI will lead to huge demand for related tools and technologies in the future
- With growing maturity of the market, buyers demand an end-to-end technology capability and the flexibility to choose different combinations from service providers
- Business users now prefer open source tools over commercial-off-the-shelf tools as the former offer the more customizability and cost advantages

Service provider landscape

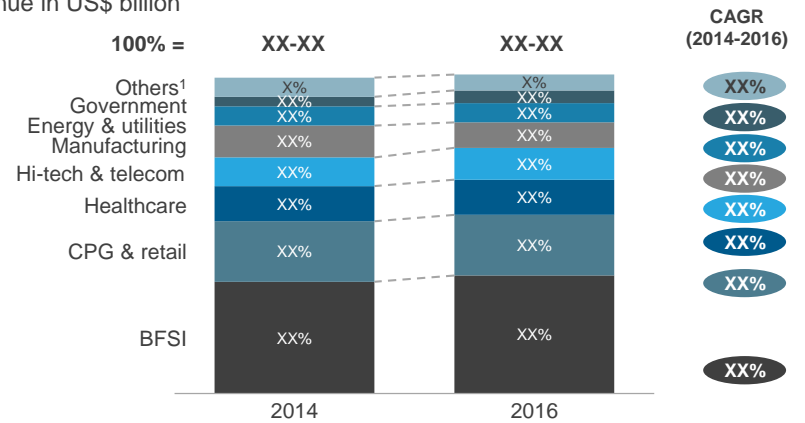
- While the service provider landscape is divided between specialists and BPO providers, their capabilities have converged over the years. BPO providers are now building advanced analytics capabilities and specialists are also adding basic reporting and dashboarding capabilities to their product portfolio
- The list of largest players across industries is dominated by BPO players that have built all round capabilities and leverage their broader BPO relations to drive business growth

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

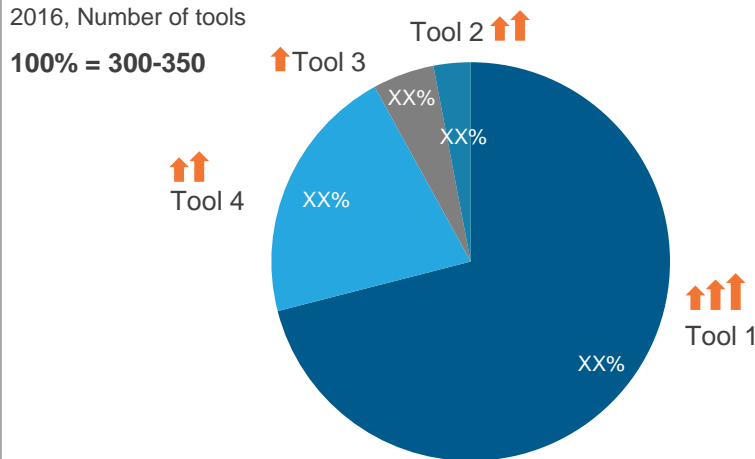
Global analytics BPS market size and growth
Annual revenue in US\$ billion



Analytics BPS adoption by industry
Revenue in US\$ billion



Technology solutions by the type of tool



2016 analytics BPS service provider revenue



Source: Everest Group (2017)

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

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