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RESEARCH

Analytics Business Process Services (BPS) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018

Business Process Services (BPS)
Market Report – May 2018: Complimentary Abstract / Table of Contents

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PEAK MATRIX™

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

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More about membership

In addition to a suite of published research, a membership may include

- Price book
- Pinnacle Accelerators
- Data cuts
- Analyst access
- Virtual Roundtables
- Workshops

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

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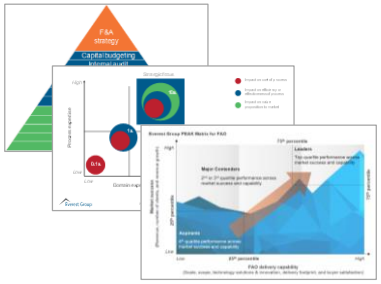
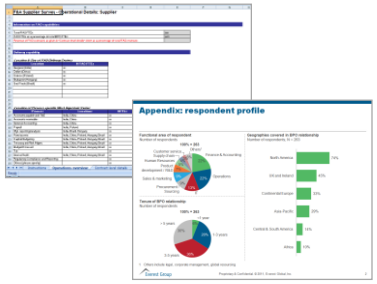
Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

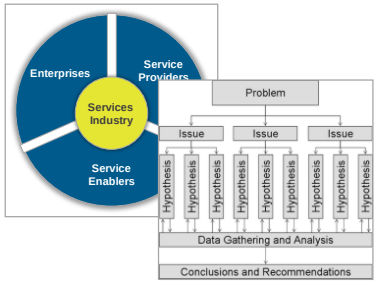
1 Robust definitions and frameworks
(Third-party BPS market definition, PEAK Matrix, and market maturity)



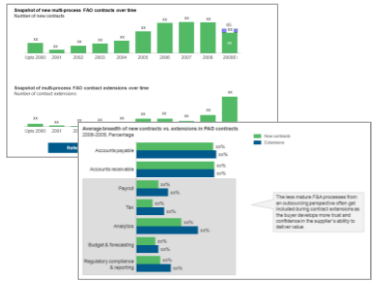
2 Primary sources of information
(Annual contractual and operational RFIs, service provider briefings, buyer interviews, and web-based surveys)



3 Diverse set of market touchpoints
(Ongoing interactions across key stakeholders, inputs from a mix of perspectives and interests, supports both data analysis and thought leadership)



4 Fact-based research
(Data-driven analysis with expert perspectives, trend analysis across market adoption, contracting, and service providers)



- Year-round tracking of 20+ analytics BPS service providers
- Large repository of existing research in analytics BPS
- Dedicated team for analytics BPS research, spread over two continents
- Vast experience in advising clients on analytics BPS-related decisions
- Executive-level relationships with buyers, service providers, technology providers, and industry associations

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Background and methodology of the research

Background of the research

While analytics is being recognized as the key pillar of the digital revolution, it has managed to retain its value as a stand-alone package. Though the growth has slowed over the last few years on the back of rising maturity, analytics BPS continues to be the shining beacon in the BPS industry and managed to clock double-digit growth again in 2017. The market continues to see demand for analytics being integrated into the larger BPO deals, as clients look for end-to-end solutions through analytics rather than siloed solutions.

North America enjoys the lion's share of the market and most of the analytic BPS providers are focused on this geography. Accenture, Genpact, IBM, and TCS continue to dominate the global analytics BPS market in terms of market share and are major players across most of the geographies.

With shifting client demands, service providers are now looking to integrate analytics as a single offering across their IT and BPS operations, and the synergy between the two arms is helping these providers deliver more valuable solutions to the clients. Productized solutions are also gaining more prominence in the market due to their cost and quicker deployment. With technologies such as IoT paving way for the next wave of data disruption, clients and service providers need to ensure that they have the right capabilities to collect, clean, and handle this data while drawing meaningful insights through it.

Scope and methodology

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

- Relative positioning of 20 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

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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; AEGIS Experience. We make it easy.; BRIDGE i2i INFORMATION · INSIGHT · IMPACT; Capgemini; Cognizant; EXL look deeper.; fractal; genpact; IBM; Infosys; intelenet; Mu Sigma DO THE MATH; LatentView; NTT DATA; TATA CONSULTANCY SERVICES; TIGER ANALYTICS; Tech Mahindra; wipro; WNS Extending Your Enterprise

Note: Assessment for Absolutdata, Fractal Analytics, 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

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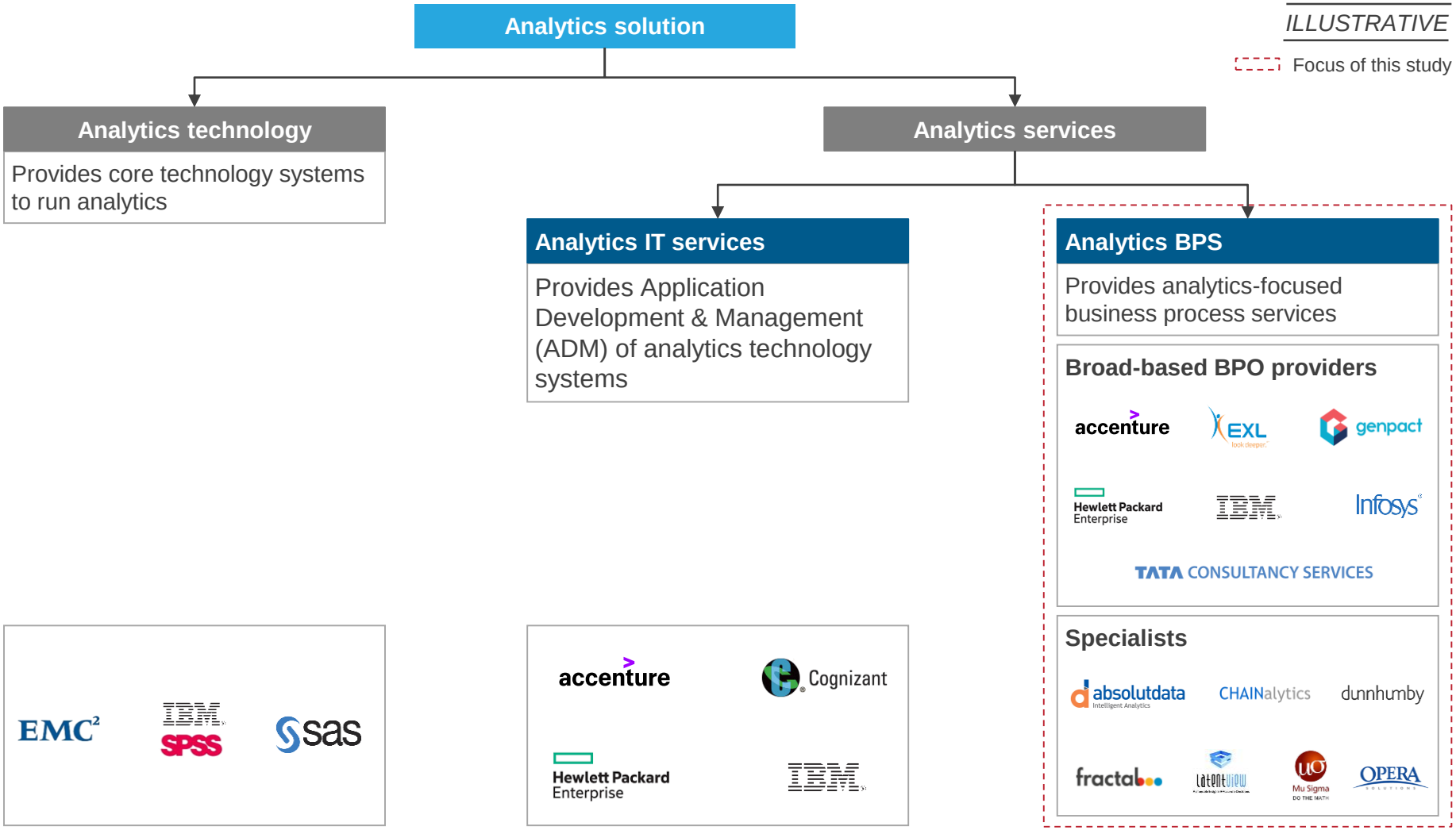
Scope of the study

This study focuses on the BPS aspect of an analytics solution



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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 20 Analytics BPS service providers on Everest Group 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, Infosys, Intelenet, Latentview, Mu Sigma, NTT Data, Tiger Analytics, Wipro, and WNS emerged as Major Contenders
- Aegis and Tech Mahindra are Aspirants on the PEAK Matrix for Analytics BPS
- Accenture, EXL, and Fractal Analytics 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 2017

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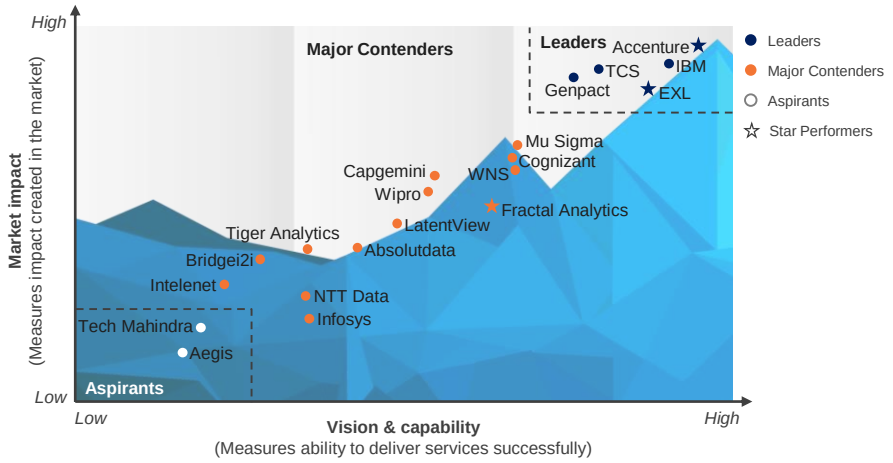
This study offers distinct chapters providing a deep dive into key aspects of the Analytics BPS service provider landscape; below are four charts to illustrate the depth of the report

Everest Group PEAK Matrix™ 2018 for analytics BPS



Capability assessment

Measure of capability: High Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	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									

Everest Group's remarks on service providers

Measure of capability: High Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Scope of services offered	Innovation and investments	Delivery footprint	Vision and strategy	Overall

Strengths

- XXX provides analytics services to some of the largest organizations globally across areas such as big data analytics, marketing & spend analytics, and customer analytics
- It has invested heavily in its internal set of advanced analytics tools and solutions that also encompass broader themes such as Artificial Intelligence (AI)
- Its capability within analytics, that encompasses solutions from dashboarding and BI to advance analytics solutions, allows it to offer a more valuable proposition to its clients
- A diversified portfolio spanning multiple geographies and industries helps the firm to mitigate any potential concentration risk

Areas of improvement

- While it has sales offices in multiple locations, the bulk of its delivery is done through its centers in India. Expanding in onshore locations can provide the firm with a better connect with clients
- Partnerships with other firms can help XXX fill capability gaps in the areas and pockets that it operates in, and offer a better value proposition to its clients
- With a good growth momentum in the last few years, XXX can now look to ramp up the scale of its operations to emerge as a serious competitor to some of the larger firms in this area
- Partnering with broader BPO firms to offer its advanced analytics capabilities can not only help it grow its business, but can also open up the possibility of leveraging that experience to broaden its capabilities

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Research calendar – Analytics Business Process Services (BPS)

Published Planned Current release

Flagship analytics BPS reports	Release date
Analytics BPS – Service Provider Landscape with PEAK Matrix™ Assessment 2017	May 2017
Analytics BPS – Analytics Disrupting Traditional Decision-Making for Businesses – The Quest for More Continues	July 2017
Analytics Business Process Services (BPS) – Service Provider Compendium 2017	August 2017
Analytics Business Process Services (BPS) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018	**May 2018**
Analytics BPS – Annual Report 2018	Q1 2018
Analytics Business Process Services (BPS) – Service Provider Compendium 2017	Q1 2018

Thematic analytics BPS reports	
Social Media Analytics – Growth Engine for Next-Gen Customer Care	June 2015
HR Analytics in Europe: A Patchwork Landscape	September 2015
Analytics: All You Need to Know about the Hottest Topic of the Twenty-First Century	September 2015
Giving Talent Acquisition the “Analytics Nirvana” Edge	November 2016

Note: For a list of all of our BPS reports, please visit the BPS on our reports portal

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Additional BFS BPO research references

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

1. **Analytics Business Process Services (BPS) – Analytics Disrupting Traditional Decision Making for Businesses – The Quest for More Continues** (EGR-2017-10-R-2264); 2017. This report assists key stakeholders (buyers, service providers, and technology providers) to understand the dynamics of the analytics BPS market and helps them identify the trends and outlook for 2017-2018. In this backdrop, this report provides comprehensive coverage of the global analytics BPS market including detailed analysis of market size & growth, buyer adoption trends, analytics BPS value proposition & solution characteristics, and service provider landscape

2. **Analytics Business Process Services (BPS) – Service Provider Landscape with PEAK Matrix™ Assessment 2017** (EGR-2017-10-R-2156); 2017. This report provides insights into the global analytics BPS market and examines the service provider landscape and its impact on the market. It focuses on service provider positions & growth in the market, changing market dynamics & emerging service provider trends, and assessment of service provider delivery capabilities

1. **Analytics Business Process Services (BPS) – Service Provider Compendium 2017** (EGR-2017-10-R-2307); 2017. 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

2. **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, solution characteristics, and service provider landscape

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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 empower 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.

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