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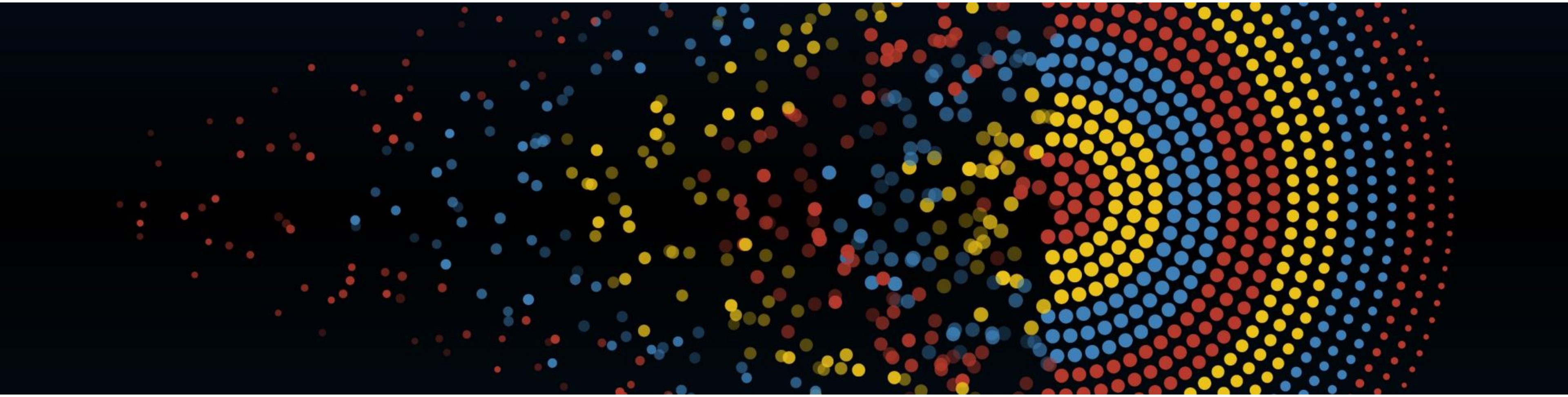

Data & Analytics (D&A) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019

Data & Analytics
Market Report – August 2019: Complimentary Abstract / Table of Contents

Everest Group® PEAK MATRIX™

EGR-2019-44-CA-3309

Our research offerings for global services

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

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Membership information

- This report is included in the following research program(s)
  – Data & Analytics
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at info@everestgrp.com, unitedkingdom@everestgrp.com, or india@everestgrp.com

More about membership

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

- Accelerators™
- Analyst access
- Data cuts
- Pinnacle Model™ reports
- PriceBook
- 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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Background and scope of the research

Background of the research

The global D&A market witnessed a robust Year-on-Year (YOY) growth of 17-18% in 2018. The demand for D&A services remained strong from traditionally leading markets of North America (50%) and Europe (30%), as well as from the emerging APAC market (15%). Industries with high D&A maturity such as BFSI and retail, distribution, & CPG continued to lead by contributing to about 50% of the global D&A market. Industries with relatively low D&A adoption such as Healthcare & life sciences showed high momentum caused by regulatory requirements, and service providers' increased focus on developing verticalized solutions beyond mature industries. Owing to rapid technology disruption and the emerging technology landscape, buyers demonstrated a higher demand for onshore resources for D&A implementations. This onshore demand, coupled with immigration policies, has led service providers to tie up with universities and groom talent locally. Also, service providers across the D&A ecosystem invested heavily in building end-to-end D&A capabilities and building a strong IP portfolio.

In this research, we focus on:

- Everest Group's Services PEAK Matrix™ evaluation, a comprehensive assessment of 21 D&A service providers
- Remarks on key strengths and areas of improvement for each D&A service provider
- Further, each service provider profile provides a comprehensive view of its geography focus, industry focus, buyer size, key intellectual property (IP), and partnerships and investments
- Service provider landscape

Research scope and inclusion criteria: In this research, we present an assessment of 21 (D&A) service providers covering all aspects of D&A services – strategy and consulting, data management, analytics and insights, and data trust

Service providers included in the current assessment

- Accenture, Atos, Capgemini, Cognizant, Datamatics, Deloitte, DXC Technology, EY, Genpact, HCL, IBM, Infosys, KPMG, LTI, NTT Data, PwC, TCS, Tech Mahindra, Virtusa, Wipro, and WNS

Other service providers with significant play in the global D&A market

- The below-mentioned players are not considered for D&A PEAK Matrix™ assessment considering the end-to-end scope of the study. They will be assessed as a part of A&I PEAK Matrix™ assessment, which focuses on the analytics and insights services within the global D&A market:
  - EXL, Fractal Analytics, and Mu Sigma

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Overview and abbreviated summary of key messages

This report examines the global Data and Analytics (D&A) market and evaluates the positioning of service providers on the Everest Group PEAK Matrix™. It provides insights into the changing market dynamics, service provider delivery capabilities, and Everest Group's remarks on service providers' key strengths and areas of improvement.

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

Market growth

- The global D&A market witnessed a robust Year-on-Year (YOY) growth of 17-18% in 2018. The demand for D&A services remained strong from traditionally leading markets of North America (50%) and Europe (30%), as well as from the emerging APAC market (15%).
- Industries with high D&A maturity such as BFSI and retail, distribution, & CPG continued to lead by contributing to about 50% of the global D&A market. Industries with relatively low D&A adoption such as healthcare and life sciences showed high momentum caused by regulatory requirements, and service providers' increased focus on developing verticalized solutions beyond mature industries

Changing market dynamics

- Service providers across the D&A ecosystem have made continued organic and inorganic investments and extensively leveraged the partner ecosystem to build an integrated approach with a combination of capabilities across data management, analytics & insights, and strategy & consulting
- Based on the extent of capability development and service providers' sweet spots within the integrated approach, we see four segments of D&A service providers (further examined in the full report)

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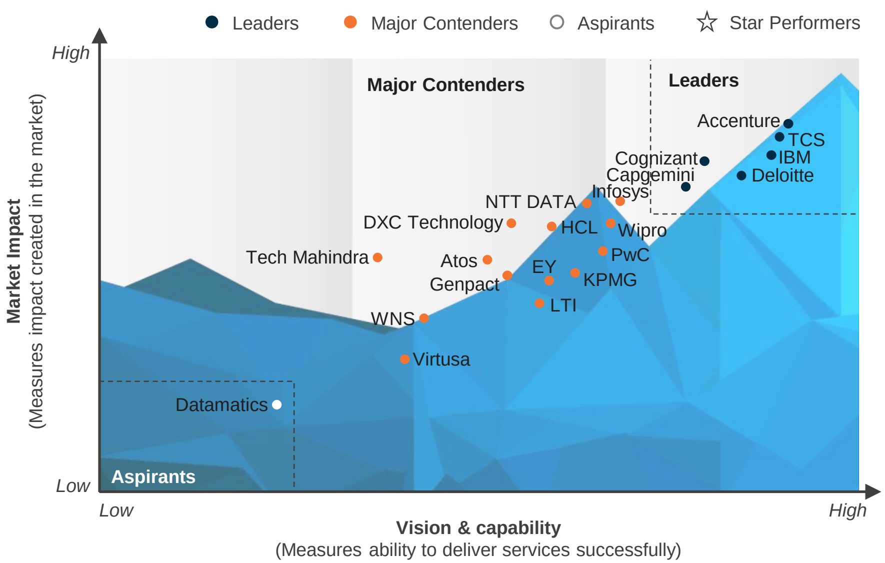
This study provides an assessment of the leading providers of Data & Analytics services

Assessment of Data & Analytics Service Providers



1 PEAK Matrix specific to Data & Analytics services
2 Assessment for Deloitte, DXC Technology, EY, IBM, KPMG, and PwC excludes service provider inputs on this particular study, and is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of service providers' public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete

Capability assessment

Illustrative example

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	3/4	3/8	3/4	5/8	5/8	3/8	5/8	5/8	1/2
Service provider 2	1/4	1/2	1/2	3/8	1/4	3/8	3/4	1/2	3/8
Service provider 3	3/8	3/4	3/4	5/8	7/8	1/2	3/8	1/2	5/8
Service provider 4	3/8	1/2	5/8	5/8	full	3/8	3/4	1/2	5/8
Service provider 5	5/8	3/4	1/2	5/8	5/8	5/8	1/4	1/2	1/2
Service provider 6	1/2	3/8	5/8	1/2	5/8	1/4	3/8	5/8	3/8
Service provider 7	1/2	3/8	3/4	1/2	3/4	3/8	full	5/8	5/8
Service provider 8	1/2	1/4	5/8	1/2	3/8	3/8	1/4	5/8	3/8
Service provider 9	1/4	1/2	3/4	3/8	3/4	3/8	5/8	5/8	1/2

Everest Group's remarks on service providers

Illustrative example

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
3/4	7/8	full	7/8	full	3/4	7/8	3/4	7/8

Strengths

- Service provider 1 has strong IP with a broad range of vertical-specific-off-the-shelf accelerators and leverages it to gain client confidence on its agility to deliver D&A services
- It is gaining client confidence by offering innovative value-based pricing models

Areas of improvement

- Service provider 1 should build advanced analytics and advisory capabilities to win large deals
- Reference clients quote that it must focus on ways to retain its talent

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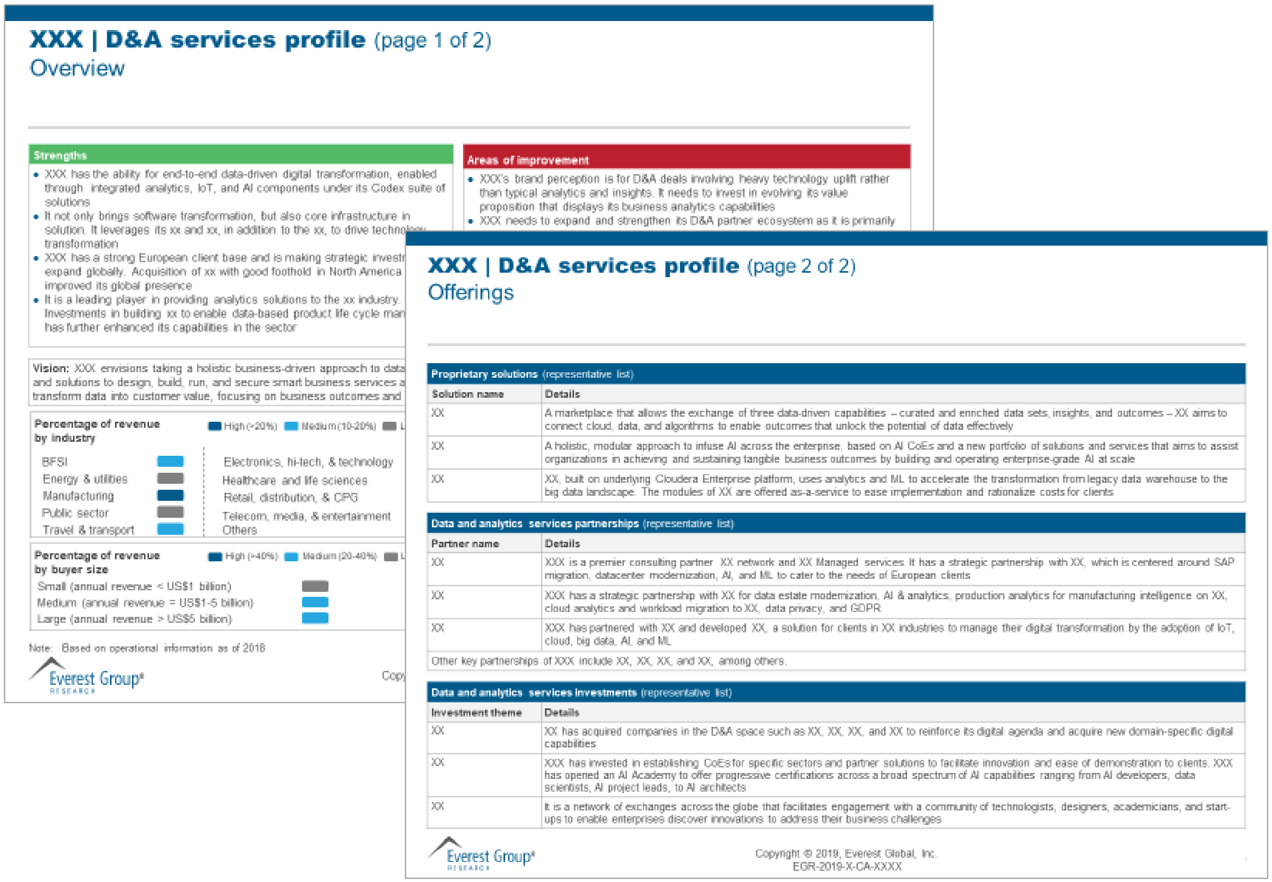
The report has over 20 service provider profiles providing comprehensive view of geography focus, industry focus, buyer size, key intellectual property (IP), and partnerships and investments



XXX | D&A services profile (page 1 of 2)
Overview

Strengths
- XXX has the ability for end-to-end data-driven digital transformation, enabled through integrated analytics, IoT, and AI components under its Codex suite of solutions
- It not only brings software transformation, but also core infrastructure in solution. It leverages its xx and xx, in addition to the xx, to drive technolog...
- XXX has a strong European client base and is making strategic investm... expand globally. Acquisition of xx with good foothold in North America improved its global presence
- It is a leading player in providing analytics solutions to the xx industry. Investments in building xx to enable data-based product life cycle man... has further enhanced its capabilities in the sector

Areas of improvement
- XXX's brand perception is for D&A deals involving heavy technology uplift rather than typical analytics and insights. It needs to invest in evolving its value proposition that displays its business analytics capabilities
- XXX needs to expand and strengthen its D&A partner ecosystem as it is primarily

Vision: XXX envisions taking a holistic business-driven approach to data... and solutions to design, build, run, and secure smart business services a... transform data into customer value, focusing on business outcomes and...

Percentage of revenue by industry High (>20%) Medium (10-20%)

BFSI; Energy & utilities; Manufacturing; Public sector; Travel & transport; Electronics, hi-tech, & technology; Healthcare and life sciences; Retail, distribution, & CPG; Telecom, media, & entertainment; Others

Percentage of revenue by buyer size High (>40%) Medium (20-40%)

Small (annual revenue < US$1 billion)
Medium (annual revenue = US$1-5 billion)
Large (annual revenue > US$5 billion)

Note: Based on operational information as of 2018

XXX | D&A services profile (page 2 of 2)
Offerings

Proprietary solutions (representative list)	
Solution name	**Details**
XX	A marketplace that allows the exchange of three data-driven capabilities – curated and enriched data sets, insights, and outcomes – XX aims to connect cloud, data, and algorithms to enable outcomes that unlock the potential of data effectively
XX	A holistic, modular approach to infuse AI across the enterprise, based on AI CoEs and a new portfolio of solutions and services that aims to assist organizations in achieving and sustaining tangible business outcomes by building and operating enterprise-grade AI at scale
XX	XX, built on underlying Cloudera Enterprise platform, uses analytics and ML to accelerate the transformation from legacy data warehouse to the big data landscape. The modules of XX are offered as-a-service to ease implementation and rationalize costs for clients

Data and analytics services partnerships (representative list)	
Partner name	**Details**
XX	XXX is a premier consulting partner. XX network and XX Managed services. It has a strategic partnership with XX, which is centered around SAP migration, datacenter modernization, AI, and ML to cater to the needs of European clients
XX	XXX has a strategic partnership with XX for data estate modernization, AI & analytics, production analytics for manufacturing intelligence on XX, cloud analytics and workload migration to XX, data privacy, and GDPR
XX	XXX has partnered with XX and developed XX, a solution for clients in XX industries to manage their digital transformation by the adoption of IoT, cloud, big data, AI, and ML
Other key partnerships of XXX include XX, XX, XX, and XX, among others.	

Data and analytics services investments (representative list)	
Investment theme	**Details**
XX	XX has acquired companies in the D&A space such as XX, XX, XX, and XX to reinforce its digital agenda and acquire new domain-specific digital capabilities
XX	XXX has invested in establishing CoEs for specific sectors and partner solutions to facilitate innovation and ease of demonstration to clients. XXX has opened an AI Academy to offer progressive certifications across a broad spectrum of AI capabilities ranging from AI developers, data scientists, AI project leads, to AI architects
XX	It is a network of exchanges across the globe that facilitates engagement with a community of technologists, designers, academicians, and start-ups to enable enterprises discover innovations to address their business challenges

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Research calendar – Data & Analytics

Published | Planned | Current release

Flagship Data & Analytics reports	Release date
Data & Analytics (D&A) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019	**August 2019**
Data & Analytics (D&A) – State of the Market Report	Q3 2019
Sales & marketing analytics in Life Sciences: PEAK™ Matrix for Services Assessment 2019	Q3 2019
Analytics & Insights – PEAK™ Matrix for Services Assessment 2019	Q4 2019
Analytics in insurance – Third-Party Service Provider PEAK Matrix™ Assessment 2019	Q4 2019

Thematic Data & Analytics reports	
CXM Analytics PEAK Matrix for Services Assessment 2019	May 2019
Future of data	Q3 2019
State of the D&A Market and Provider Landscape in CPG & Retail	Q3 2019
Information and Data Management Services	Q4 2019

Note: For a list of all of our published D&A reports, please refer to our website page

Additional 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. **Customer Experience (CX) Analytics – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019** (EGR-2019-21-R-3157). This report examines the Customer Experience (CX) analytics services market and evaluates the positioning of 14 CX analytics service providers on the Everest Group PEAK Matrix. It provides insights into the market adoption of CX analytics services, relative positioning of service providers, and Everest Group's remarks on service providers' CX analytics capabilities.

2. **Analytics Business Process Services (BPS) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2018** (EGR-2018-0-R-2593). This study assesses the analytics business process capabilities of different service providers (legacy BPO providers and analytics specialists) and evaluates their positioning on the Everest Group PEAK Matrix.

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

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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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