Advanced Analytics & Insights – Service Provider Landscape with Services PEAK Matrix™ Assessment 2020

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

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PEAK MATRIX™

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Membership information

- This report is included in the following research program
  - Data & Analytics
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- Accelerators™
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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 majority of enterprises use multiple vendors to deliver Data and Analytics (D&A) services for multiple reasons, such as risk diversification, vendor expertise in subsections of the value chain, and enterprise stakeholders with varied priorities. In particular, in Advanced Analytics and Insights services within the D&A value chain, specialized vendors / pure play analytics firms are offering significant competition to end-to-end D&A service providers. With a complex enterprise D&A landscape and competent specialized service providers, vendor consolidation is unlikely in the near future, so it is important to evaluate service providers on capabilities specific to delivering Advanced Analytics & Insights services.

This report includes:
- Everest Group's Services PEAK Matrix™ evaluation, a comprehensive assessment of 31 advanced analytics & insights service providers
- Key strengths and areas of improvement for each service provider
- Service provider profiles that offer a comprehensive view of each provider's geographic, industry, and function focus, as well as buyer size, key intellectual property (IP), and partnerships and investments

Research scope and inclusion criteria: In this research, we assess 31 advanced analytics & insights service providers covering all aspects of the services – strategy and consulting, BI and visualization, and advanced analytics

Service providers included in this assessment
Accenture, BRIDGEi2i, Capgemini, Cognizant, Datamatics, Deloitte, DMI, DXC Technology, EXL, EY, Fractal Analytics, Genpact, HCL Technologies, IBM, KPMG, LatentView Analytics, LTI, Mphasis, Mu Sigma, NTT DATA, PwC, Stefanini, Sutherland, TCS, Tech Mahindra, Tredence, UST Global, Virtusa, Wipro, WNS, and Zensar

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Overview and abbreviated summary of key messages

This report examines the global advanced analytics & insights market and evaluates the positioning of service providers on the Everest Group PEAK Matrix™. It provides insights into service provider delivery capabilities, investments and Everest Group's remarks on service providers' key strengths and areas of improvement.

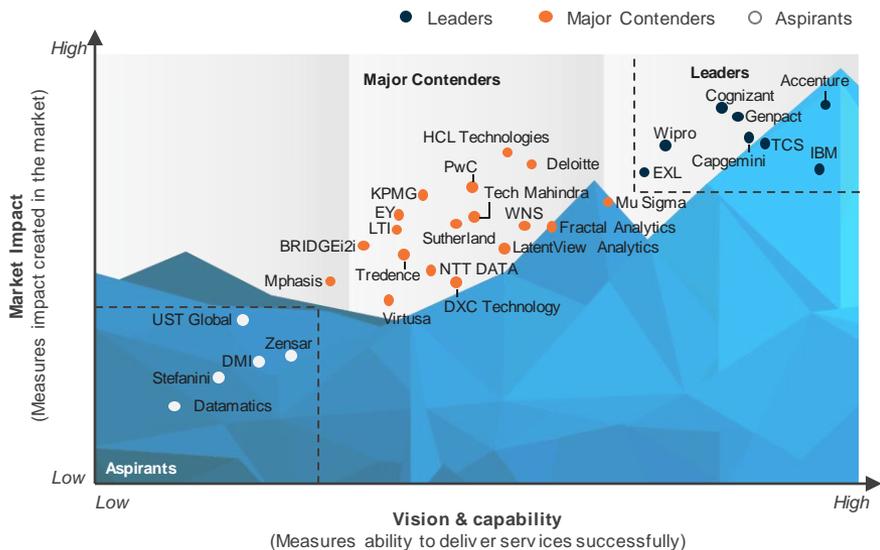**Some of the findings in this report, among others, are:**

Market position and growth

- The global advanced analytics & insights market witnessed a robust Year-on-Year (YOY) growth of 21-22% in 2018-19. The demand for analytics services remained strong from traditionally leading markets of North America (54%) and Europe (29%), as well as from the emerging APAC market (12%)

- Industries with high analytics maturity such as BFSI and retail, distribution, & CPG continued to lead by contributing to about 50% of the global Advanced Analytics & Insights market

Service provider delivery capability

- Delivery of advanced analytics & insights services needs a mix of capabilities including business, technology and data science expertise. Hence players offering business process services and IT services, as well as pure play analytics firms are heavily investing to gain greater share in this high growth market

- Accenture, Capgemini, Cognizant, EXL, Genpact, IBM, TCS, and Wipro are the current leaders in the global advanced analytics & insights market. However, several service providers are emerging as major contenders

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

Assessment of Advanced Analytics & Insights services

● Leaders   ● Major Contenders   ○ Aspirants

Market Impact (Measures impact created in the market)

High

Vision & capability (Measures ability to deliver services successfully)

Low → High

- Leaders: Accenture, Cognizant, Genpact, Wipro, TCS, Capgemini, IBM, EXL, Mu Sigma
- Major Contenders: HCL Technologies, PwC, Deloitte, KPMG, Tech Mahindra, EY, LTI, WNS, Sutherland, Fractal Analytics, BRIDGEi2i, LatentView Analytics, Tredence, NTT DATA, Mphasis, Virtusa, DXC Technology
- Aspirants: UST Global, Zensar, DMI, Stefanini, Datamatics

1 PEAK Matrix specific to advanced analytics & insights services
2 Assessments for Deloitte, DXC Technology, EY, Fractal Analytics, IBM, KPMG, NTT DTA, and PwC exclude service provider inputs in this study. The assessment of these service providers 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	◕	◔	◔	◔	◔	◕	◑	◑	◑
Service provider 2	◔	◑	◑	◑	◑	◑	◕	◑	◑
Service provider 3	◕	◑	◑	◑	◕	◑	◑	◑	◑
Service provider 4	◕	◑	◑	◑	●	◕	◑	◑	◑
Service provider 5	◕	◑	◑	◑	◑	◑	◑	◕	◑
Service provider 6	◑	◑	◑	◑	◑	◑	◑	◑	◑
Service provider 7	◑	◕	◑	◑	◑	◑	●	◑	◑
Service provider 8	◕	◑	◑	◑	◑	◕	◑	◑	◑
Service provider 9	◔	◑	◑	◑	◕	◑	◑	◑	◑

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
	◕	◕	●	◕	●	◔	◕	◔	◕

Strengths

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

Areas of improvement

- Service provider 1 should increase offerings of domain specific solutions
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

The report has over 30 service provider profiles providing comprehensive view of geography focus, industry focus, buyer size, key intellectual property (IP), and partnerships and investments

Research calendar – Data & Analytics

Flagship Data & Analytics reports	Release date
Data & Analytics (D&A) Service Provider Landscape with Services PEAK Matrix™ Assessment 2019	**May 2019**
Advanced Analytics & Insights Service Provider Landscape with Services PEAK Matrix™ Assessment 2020	**December 2019**
Data & Analytics (D&A) – State of the Market Report	Q4 2019
Data & Analytics (D&A) Service Provider Landscape with Services PEAK Matrix™ Assessment 2020	Q2 2020

Thematic Data & Analytics reports	
CXM Analytics PEAK Matrix for Services Assessment 2019	May 2019
Sales & marketing analytics in Life Sciences: PEAK™ Matrix for Services Assessment 2019	Q4 2019
Analytics in insurance – Third-Party Service Provider PEAK Matrix™ Assessment 2019	Q1 2020
Future of data	Q1 2020

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

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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. **Data & Analytics (D&A) – Service Provider Landscape with Services PEAK Matrix™ Assessment 2019** (EGR-2019-44-R-3309). This study assesses the Data & Analytics capabilities of different service providers and evaluates their positioning on the Everest Group PEAK Matrix.

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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