

# Data and Analytics (D&A) Services PEAK Matrix<sup>®</sup> Assessment 2020

September 2020: Complimentary Abstract / Table of Contents



# 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	▶ Finance & Accounting
▶ BPS   Banking & Financial Services	▶ Human Resources
▶ BPS   Healthcare & Life Sciences	▶ ITS   Banking & Financial Services
▶ BPS   Insurance	▶ ITS   Healthcare
▶ Catalyst™	▶ ITS   Insurance
▶ Cloud & Infrastructure	▶ IT Services Executive Insights™
▶ Customer Experience Management Services	▶ ITS   Life Sciences
▶ Contingent Workforce Management	▶ Locations Insider™
▶ Data & Analytics	▶ PricePoint™
▶ Digital Services	▶ Procurement
▶ Engineering Services	▶ Recruitment Process Outsourcing
▶ Enterprise Platform Services	▶ Service Optimization Technologies

## 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](mailto:info@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

# Contents

Vishal Gupta, Practice Director

Arpita Dwivedi, Senior Analyst

Deepthi Mudunooru, Senior Analyst

Akash Tandon, Analyst

<b>1. Introduction and overview</b>	<b>6</b>
• Research methodology	7
• Key information on the report	8
• Background and/or introduction	9
• Focus of the research	10
<b>2. D&amp;A services – market characteristics</b>	<b>11</b>
• D&A services trends	12
• Service provider landscape	13
• Key enterprise imperatives and challenges	18
• Implications for enterprises	19
• Implications for service providers	20
<b>3. D&amp;A Services PEAK Matrix® characteristics</b>	<b>21</b>
• PEAK Matrix framework	22
• Everest Group PEAK Matrix for D&A services	25
• Characteristics of Leaders, Major Contenders, and Aspirants	26
• Service provider capability summary dashboard	28
<b>4. Everest Group’s remarks on service providers</b>	<b>32</b>
• Leaders	32
– Accenture	33
– Capgemini	34

# Contents

– Cognizant	35
– Deloitte	36
– IBM	37
– TCS	38
– Wipro	39
• Major Contenders	40
– Atos	41
– Birlasoft	42
– Coforge	43
– DXC Technology	44
– EY	45
– HCL	46
– Infosys	47
– KPMG	48
– LTI	49
– Mphasis	50
– NTT DATA	51
– PwC	52
– Stefanini	53
– Tech Mahindra	54
– Virtusa	55
• Aspirants	56
– Datamatics	57
– DMI	58

# Contents

– Happiest Minds	59
– Sonata Software	60
– UST Global	61
– Zensar	62
<b>5. Appendix</b>	<b>63</b>
• Glossary	64
• Research calendar	65

## Background and scope of the research

The ecosystem of D&A players has succeeded in educating the market on the supremacy of evidence-based decision-making over traditional gut-based and thumb rule-based approaches. Consequently, the debate today has upgraded to ROI of D&A investments and scalability of initiatives. While enterprises have witnessed D&A investments translate into improved business outcomes and customer and employee experience, organizations are still failing to achieve the full benefit owing to the adoption of D&A programs in pockets, lack of data skills across the enterprise, and inefficient/unoptimized data management practices. In this regard, service providers can help enterprises formulate a central vision for D&A, streamline investments, modernize the data landscape, and upskill enterprise users to achieve multiple outcomes through coherent and enterprise-wide data-driven decision-making.

In this context, we present an assessment and detailed profiles of 28 service providers featured on the D&A services PEAK Matrix® 2020. Each service provider profile provides a comprehensive picture of its services focus through a snapshot of its relative capabilities across assessment parameters, key strengths, and areas of improvement, as assessed by Everest Group. The assessment is based on Everest Group's annual RFI process for the calendar year 2019, interactions with leading D&A service providers, client reference checks, and ongoing analysis of the D&A services market (refer to slide 8 for key sources of information).

**This report includes the profiles of the following 28 leading D&A service providers featured on the D&A PEAK Matrix:**

- **Leaders:** Accenture, Capgemini, Cognizant, Deloitte, IBM, TCS, and Wipro
- **Major Contenders:** Atos, Birlasoft, Coforge, DXC Technology, EY, HCL, Infosys, KPMG, LTI, Mphasis, NTT DATA, PwC, Stefanini, Tech Mahindra, and Virtusa
- **Aspirants:** Datamatics, DMI, Happiest Minds, Sonata Software, UST Global, and Zensar

### Scope of this report:



**Geography**  
Global

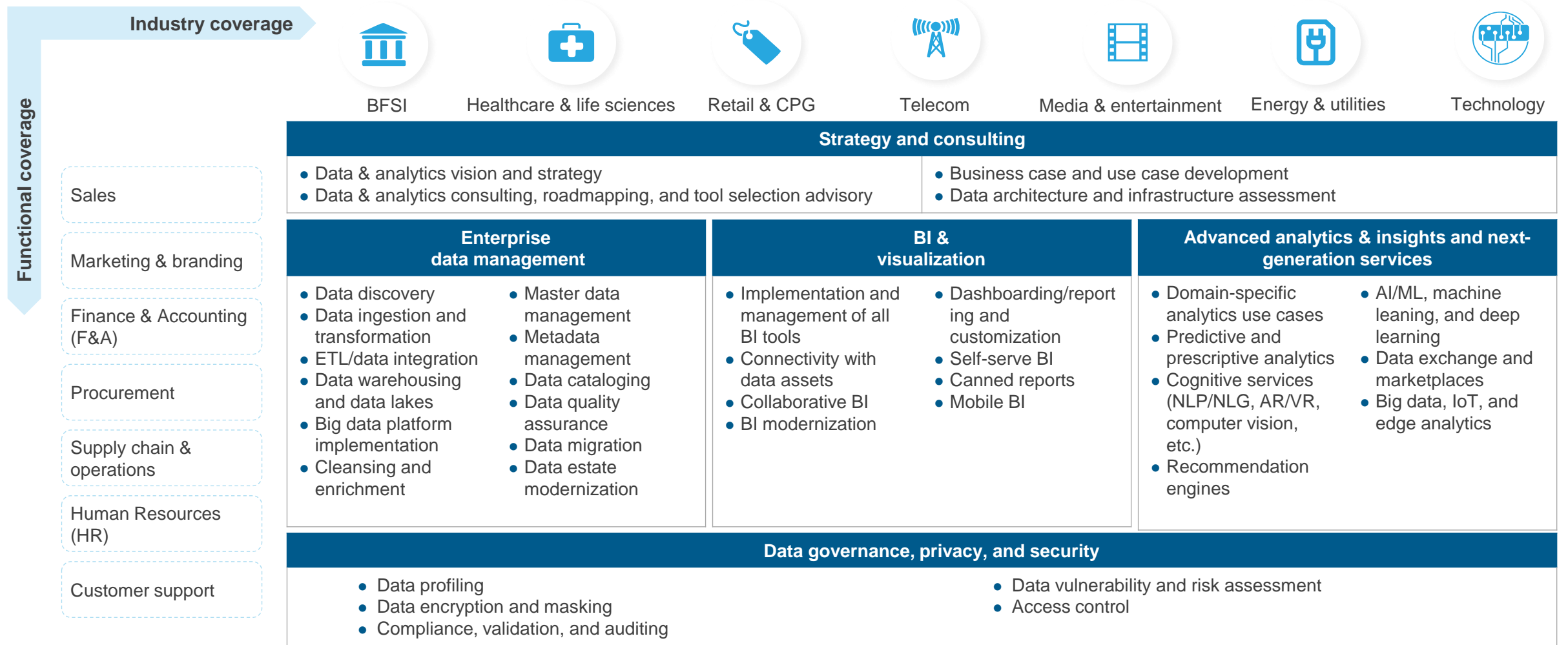


**Service providers**  
28 leading D&A service providers



**Services**  
D&A services (refer to page 7 for scope of the research)

# Everest Group's D&A program takes an end-to-end view of the market, covering all aspects of D&A solutions



## 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:

### D&A services market growth

- The global D&A market witnessed a robust Year-on-Year (YOY) growth of 17-19%, tremendously outpacing the growth of broader IT services. Modernization represents the key growth segment, with high demand for cloud migration
- Enterprise Data Management (EDM) has sustained its high demand and market share in D&A services, with enterprises looking for adopting next-generation technologies such as AI/ML to ensure comprehensive and high-quality data accessibility on demand
- Enterprises across industries and geographies have started scaling their AI initiative beyond the POC stage to enterprise-wide adoption, with technology-intensive and customer-sensitive verticals such as BFSI and communication & technology leading the pack

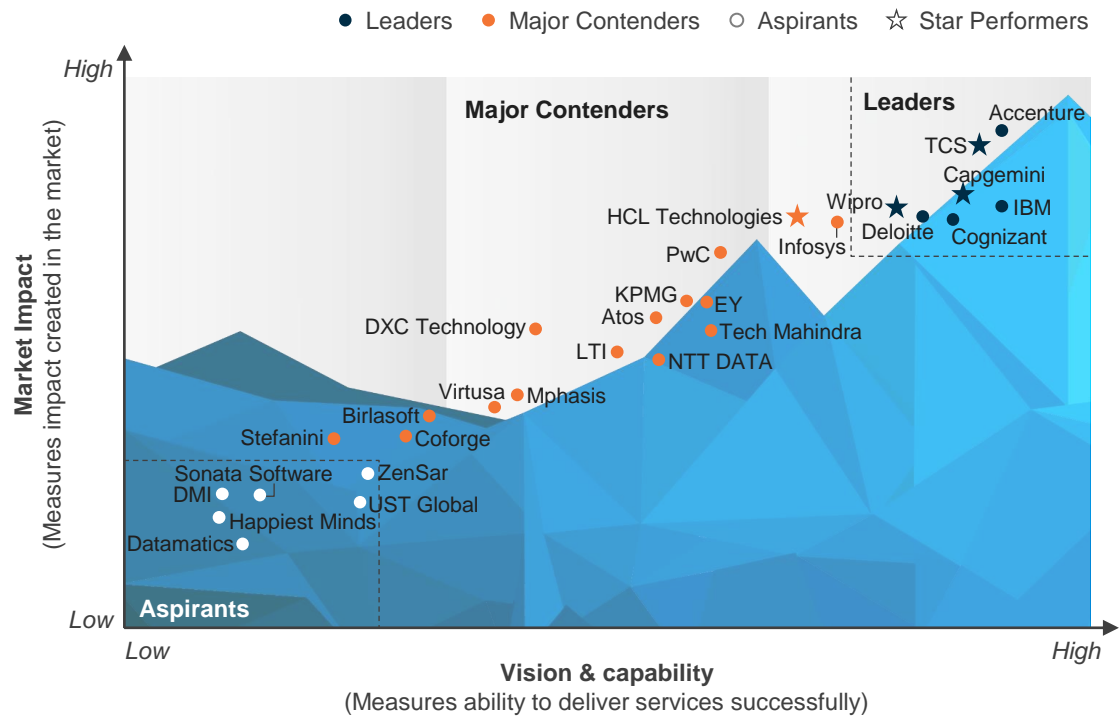
### Service provider characteristics

- 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)
- Accenture, Capgemini, Cognizant, Deloitte, IBM, TCS, and Wipro are the current leaders in the global D&A services market, with several other service providers emerging as major contenders and aspirants
- Leaders have displayed a vision focused on driving business outcomes through D&A services for their customers and exhibited sustained strategic investments to bridge the portfolio gaps to achieve end-to-end services play
- Major Contenders have a strong base of satisfied clientele within their sweet spots in the D&A stack. They have the vision to develop full services play and are investing in talent development programs, acquisitions, IP building, and a partnership ecosystem to enable the same
- Aspirants are focusing on creating solutions beyond their niche areas of expertise. While they are limited by scale to cater to the requirements of large global players, they have been pro-actively investing in upgrading their flagship proprietary offerings to drive D&A engagements



# This study offers three distinct chapters providing a deep dive into key aspects of D&A services market; below are three charts to illustrate the depth of the report

## Data and Analytics PEAK Matrix® Assessment 2020



Note: Assessment for Atos, Deloitte, DXC Technology, EY, Infosys, KPMG, NTT Data, 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	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	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	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
○	○	●	○	●	○	○	○	○

### Strengths

- Through a combination of organic and inorganic investments, service provider 1 has built a wide portfolio of D&A offerings over the years – with strength in technology implementation services as a key differentiator
- The company has long-established partnerships with technology vendors providing horizontal capabilities across the entire IT services stack

### Areas of improvement

- Service provider 1 lacks a well-rounded brand perception in D&A. While it brings strong technical expertise, its market recognition for domain/business capabilities is low
- It is still struggling with effectively maintaining consistency of its technical talent, while it makes efforts to integrate its various acquisitions

# Research calendar

## Data & Analytics

Published
  Planned
  Current release

### Data & Analytics reports

### Release date

The Future of Data	January 2020
Insurance Analytics and Insights (A&I) Third-party Services PEAK Matrix® Assessment 2020	June 2020
Data Monetization in Healthcare	July 2020
Winning the War for Talent: An Enterprise Guide to Building a Sustainable Workforce Strategy	July 2020
Charting the Skilling Journey to Build the IT Services Talent of Tomorrow	August 2020
<b>Data and Analytics (D&amp;A) Services PEAK Matrix® Assessment 2020</b>	<b>September 2020</b>
D&A in CPG & Retail – Market Report	Q3 2020
Banking analytics case book	Q3 2020
D&A Service Provider Compendium	Q4 2020
Data & Analytics (D&A) State of the Market Report 2020	Q4 2020
Advanced Analytics & Insights (AA&I) – PEAK Matrix® for Services Assessment	Q4 2020
Data Modernization	Q4 2020
Advanced analytics masterclass	Q4 2020

Note: For a list of all of our published D&A reports, please refer to our [website page](#)



Everest Group is a consulting and research firm focused on strategic IT, business services, engineering services, and sourcing. Our clients include leading global enterprises, service providers, and investors. Through our research-informed insights and deep experience, we guide clients in their journeys to achieve heightened operational and financial performance, accelerated value delivery, and high-impact business outcomes. Details and in-depth content are available at [everestgrp.com](https://www.everestgrp.com).

## Stay connected

### Website

[everestgrp.com](https://www.everestgrp.com)

### Social Media

-  @EverestGroup
-  @Everest Group
-  @Everest Group
-  @Everest Group

### Blog

[everestgrp.com/blog](https://www.everestgrp.com/blog)

### Podcast

DigitalReallTy



### Dallas (Headquarters)

[info@everestgrp.com](mailto:info@everestgrp.com)  
+1-214-451-3000

### Bangalore

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-80-61463500

### Delhi

[india@everestgrp.com](mailto:india@everestgrp.com)  
+91-124-496-1000

### London

[unitedkingdom@everestgrp.com](mailto:unitedkingdom@everestgrp.com)  
+44-207-129-1318

### New York

[info@everestgrp.com](mailto:info@everestgrp.com)  
+1-646-805-4000

### Toronto

[canada@everestgrp.com](mailto:canada@everestgrp.com)  
+1-416-388-6765

*This document is for informational purposes only, and it is being provided "as is" and "as available" without any warranty of any kind, including any warranties of completeness, adequacy, or fitness for a particular purpose. Everest Group is not a legal or investment adviser; the contents of this document should not be construed as legal, tax, or investment advice. This document should not be used as a substitute for consultation with professional advisors, and Everest Group disclaims liability for any actions or decisions not to act that are taken as a result of any material in this publication.*