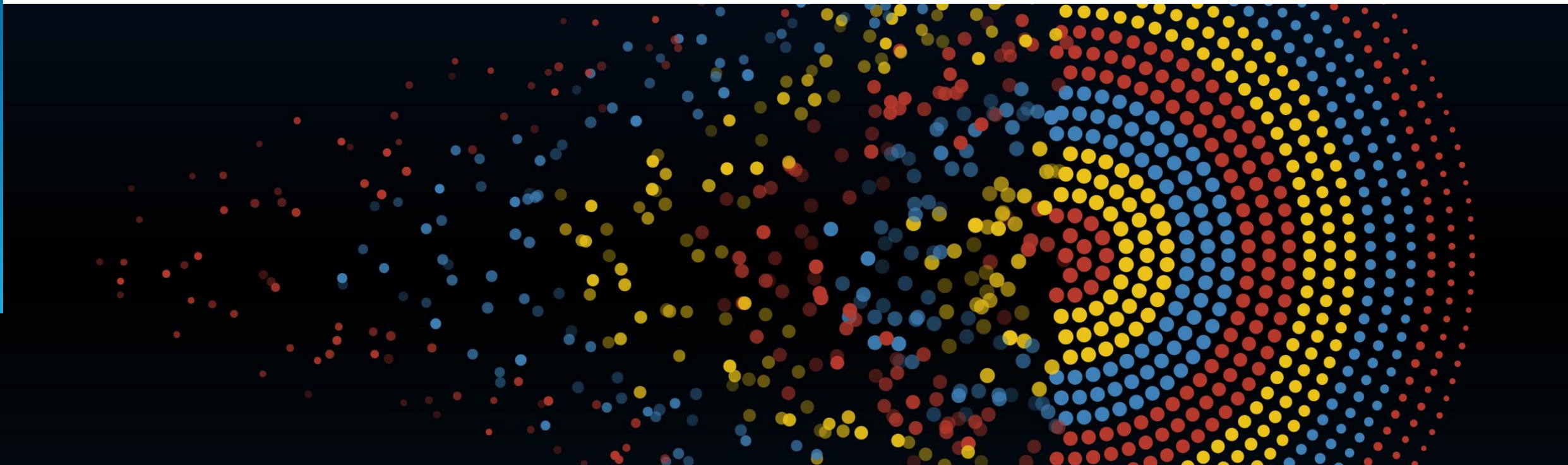


Advanced Analytics & Insights (AA&I) Services PEAK Matrix[®] Assessment 2021

December 2020: Complimentary Abstract / Table of Contents



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- Benchmarking | Pricing, delivery model, skill portfolio
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- 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/or Introduction of the research

Digitally mature enterprises that have invested heavily in D&A initiatives in recent years are now focusing on enterprise-wide adoption and democratization of analytics and insights. The pandemic further emphasized the need for agile, data-driven decision-making and placed analytics as an essential navigation tool, marking the shift in enterprise priorities toward analytics transformation, to improve speed to insights and solutions that drive operational and cost efficiencies. D&A service providers including IT/BPO firms, consulting players, and pure-play analytics providers offering rich set of AA&I capabilities, domain expertise, and off-the-shelf accelerators, can help enterprises reduce time-to-value and achieve business outcomes through coherent and enterprise-wide data-driven decision-making.

In this context, we present an assessment of 32 service providers featured on the AA&I services PEAK Matrix® 2021. 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 and 2020 H1 (January-June), interactions with leading AA&I service providers, client reference checks, and ongoing analysis of the AA&I services market.

This report includes the profiles of the following 32 leading AA&I service providers featured on the AA&I PEAK Matrix:

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

Scope of this report:



Geography
Global



Service providers
32 leading AA&I service providers



Services
AA&I services

Overview and abbreviated summary of key messages

This report examines the global Advanced Analytics & Insights (AA&I) services 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 dynamics

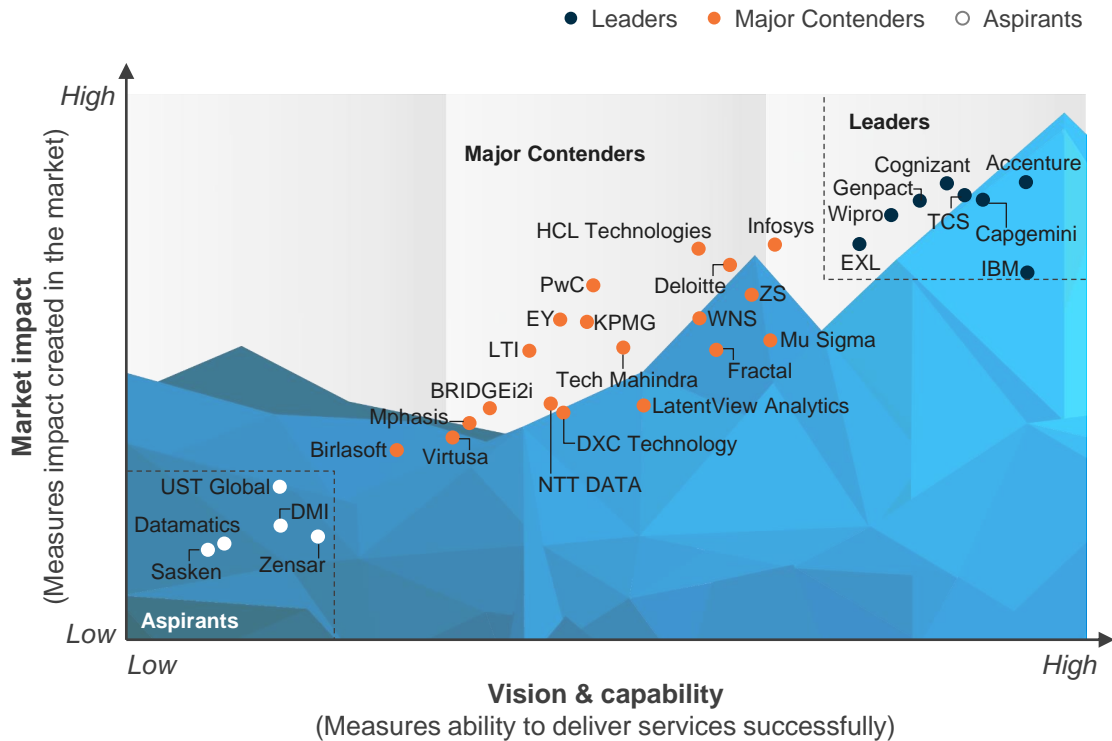
- Customer experience and sales & marketing continue to lead in analytics adoption with a strong share of about 40% of the global AA&I services market. Adoption in supply chain & distribution is on a rise
- CPG and retail, BFS, and digitally-native hi-tech are ahead in AA&I maturity compared to other industries
- Enterprises' focus in democratization of analytics and insights is on the rise as it becomes imperative for business users or non-specialists to engage in data-driven decision-making
- After the pandemic, enterprises that are struggling to cope with volatility and huge fluctuations in demand and supply are focusing on adopting analytics solutions to drive operational and cost efficiencies. Enterprise demand for speed-to-insight is also on the rise as they strive to build agility and react to fast-evolving customer behavior post-COVID-19

Service provider characteristics

- Based on the extent of capability development and service providers' sweet spots within the integrated approach, we see four segments of AA&I service providers (further examined in the full report)
- Accenture, Capgemini, Cognizant, EXL, Genpact, IBM, TCS, and Wipro are the current leaders in the global AA&I services market, with several other service providers emerging as major contenders and aspirants
- Leaders have displayed a vision focused on driving business outcomes through process-embedded analytics and next-generation services for their customers
- Major Contenders have shown high confidence in their sweet spots within the AA&I stack. Analytics-focused service providers are steadily investing in building their data engineering and cloud capabilities to focus on full services play
- Aspirants have strengthened their capabilities in its focus areas including advanced services such as IoT analytics and AI

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

Advanced Analytics & Insights (AA&I) Services PEAK Matrix® Assessment 2021¹



1 Assessments for Deloitte, DXC Technology, EY, Fractal, IBM, Infosys, KPMG, LatentView Analytics, NTT DATA, and PwC exclude service provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, service provider public disclosures, and Everest Group's interactions with buyers

Source: Everest Group (2020)

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 AA&I 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 AA&I. 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

Flagship Data & Analytics reports

	Release date
Insurance Analytics and Insights (A&I) Third-party Services PEAK Matrix® Assessment 2020	June 2020
Data and Analytics (D&A) Services PEAK Matrix® Assessment 2020	September 2020
Data and Analytics (D&A) Service Provider Compendium 2021	October 2020
Artificial Intelligence (AI) Services PEAK Matrix® Assessment 2021	November 2020
Artificial Intelligence (AI) Service Provider Compendium 2021	December 2020
Advanced Analytics & Insights (AA&I) Services PEAK Matrix® Assessment 2021	December 2020
Data and Analytics (D&A) Services State of the Market Report 2021	Q1 2021

Thematic Data & Analytics reports

	Release date
The Future of Data	January 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
Winning with Analytics in CPG & Retail – The Need to Continuously Re-invent with Evolving Customer Preferences	October 2020
Analytics Casebook – A Hitchhiker's Guide to BFS Analytics	October 2020
Is Work From Home (WFH) the Future of Work? A Perspective on WFH, Locations, and Delivery Strategy Beyond COVID-19	December 2020

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