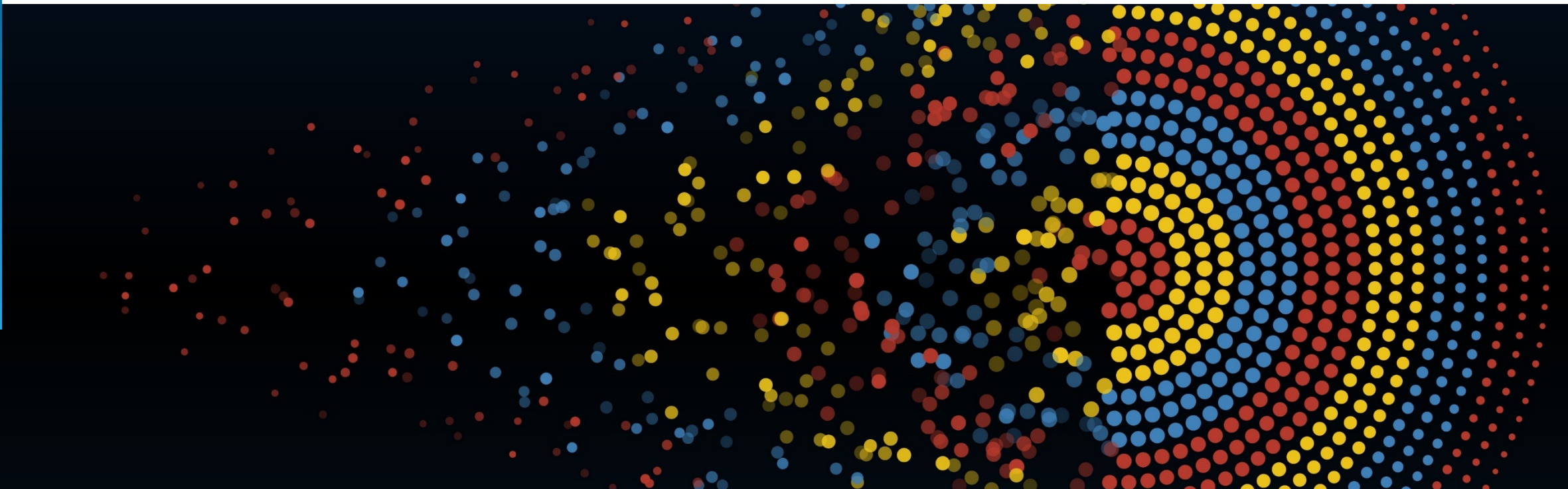


Data and Analytics (D&A) Services PEAK Matrix® Assessment 2022

August 2022: Complimentary Abstract / Table of Contents



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Background and scope of the research

Global macroeconomic conditions indicate the rising probability of a recession. Despite the resulting cost pressures, enterprise demand for D&A services is rising as enterprises realize that data-driven solutions focused on cost optimization and building competitive advantage are critical to tackle and survive the slowdown. In this regard, service providers can help enterprises in their digital transformation journey by formulating a vision for D&A, modernizing the D&A landscape, and providing the right talent and niche skill sets to achieve direct business outcomes.

In this research, Everest Group presents an assessment of 30 service providers featured on the D&A services PEAK Matrix®. Each provider profile provides a comprehensive picture of its services focus through a snapshot of its key strengths and limitations, as assessed by Everest Group. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading D&A service providers, client reference checks, and an ongoing analysis of the D&A services market.

Everest Group has employed the following exclusion criterion before assessing service providers in the D&A PEAK Matrix assessment:

- Service provider should have a separate team and dedicated leadership for its D&A services
- With reference to the D&A services research scope (slide 10), the service provider should have a meaningful presence across all D&A value chain segments
- The service provider must have substantial annual revenue from its D&A services practice

This report includes the profiles of the following 30 leading D&A service providers featured on the D&A services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Cognizant, Deloitte, IBM, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Brillio, Coforge, DXC Technology, EY, HCL Technologies, Infogain, KPMG, Kyndryl, LTI, Mindtree, Mphasis, NTT DATA, Persistent Systems, PwC, Tech Mahindra, Virtusa, and Zensar
- **Aspirants:** Birlasoft, DMI, Stefanini, and UST

Scope of this report



Geography
Global



Providers
30 leading D&A service providers



Services
D&A services (refer to page 9 for scope of the research)

Overview and abbreviated summary of key messages

This report examines the global Data and Analytics (D&A) 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 limitations.

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

D&A services market overview

- The COVID-19 crisis tempered the growth of the industry, and it is estimated to have grown by 7-8% in 2019- 20. While there was a fall in demand in the second and third quarters of 2020 due to the pandemic, the fourth quarter saw a steep rise in digital initiatives to enable remote operations and ensure business continuity
- With enterprises focusing on large digital transformation initiatives, the market recovered rapidly in 2021 and is expected to continue in its strong double-digit growth trajectory in the upcoming years
- The growth is driven by factors such as steep rise in data modernization initiatives, uptick in scaling enterprise-wide AI initiatives, rise in demand for data security and privacy services to combat data breaches & ransomware attacks as well as stringent regulatory concerns

Service provider characteristics

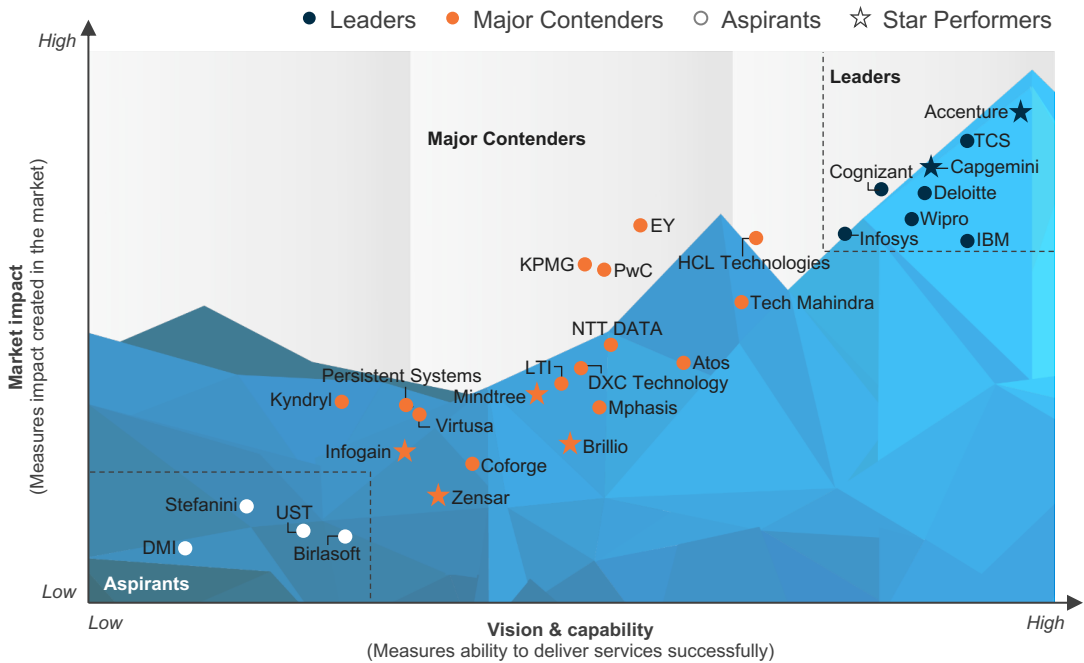
- Based on the extent of capability development and service providers' sweet spots within the integrated approach, we see four segments of D&A service providers (further examined in the full report)
- Accenture, Capgemini, Cognizant, Deloitte, IBM, Infosys, TCS, and Wipro are the current leaders in the global D&A services market, with several other service providers emerging as major contenders and aspirants
- Leaders have displayed the ability to support enterprises as a strategic partner and help derive business outcomes; they have exhibited sustained 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 making both organic and inorganic investments 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 market; below are three charts to illustrate the depth of the report

Everest Group Data and Analytics (D&A) Services PEAK Matrix® Assessment 2022^{1,2,3}

Capability assessment

Illustrative example



- Assessments for DMI, Deloitte, DXC Technology, EY, IBM, Infosys, KPMG, NTT DATA, and PwC exclude service provider inputs on this study, and are 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
- Assessments for Atos, Kyndryl, and Persistent Systems are based on partial inputs provided by service providers and are also 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
- Kyndryl and Persistent Systems are new entrants on the D&A PEAK Matrix and have therefore not been considered for the Star Performer title

Source: Everest Group (2022)

Measure of capability: 🟡 Low 🔵 High

Providers	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Provider 1	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 2	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 3	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 4	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 5	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 6	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 7	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 8	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡
Provider 9	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟡

Everest Group's remarks on providers

Illustrative example

Measure of capability: 🟡 Low 🔵 High

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

Limitations

- 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

Reports title	Release date
Analytics and AI Services Specialists PEAK Matrix® Assessment 2021	November 2021
Driving Enterprise Business Transformation with Next-generation Data Management	December 2021
Advanced Analytics & Insights (AA&I) Services PEAK Matrix® Assessment 2022	December 2021
Machine Learning Operations (MLOps): the Foundation of an Enterprise Built on Artificial Intelligence (AI)	January 2022
Data and Analytics (D&A) Services State of the Market Report 2022	January 2022
Analytics and AI Services Specialists – Service Provider Compendium 2022	February 2022
Artificial Intelligence (AI) Services PEAK Matrix® Assessment 2022	March 2022
Artificial Intelligence (AI) Service Provider Compendium 2022	March 2022
Accelerating the Value of Data in Life Sciences	March 2022
Harnessing the Power of Analytics and AI in Medicine: Life Sciences Enterprises Revamping Processes to Improve Patient Outcomes	May 2022
Unleashing the Power of AI for Business Transformation	May 2022
Data and Analytics (D&A) Services PEAK Matrix® Assessment 2022	August 2022
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