

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

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

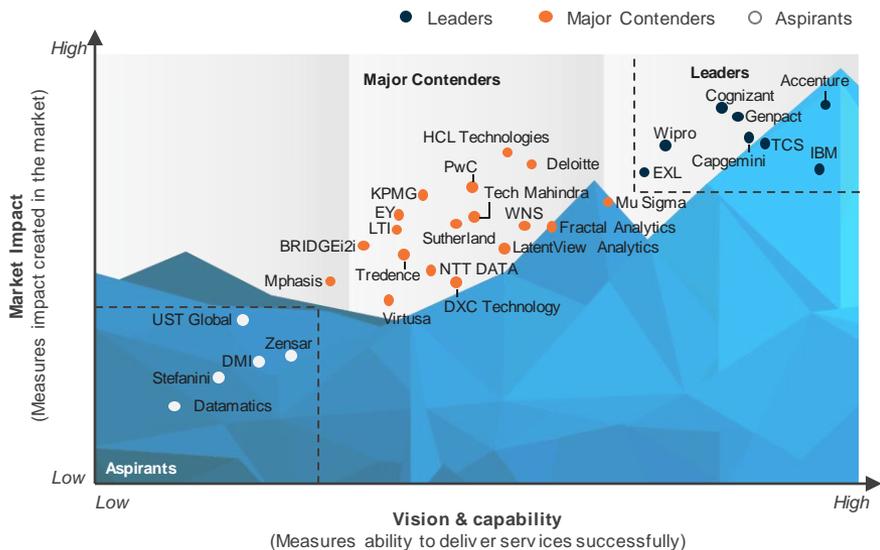
- The global advanced analytics & insights market witnessed a robust Year-on-Year (YOY) growth of 21-22% in 2018-19. The demand for analytics services remained strong from traditionally leading markets of North America (54%) and Europe (29%), as well as from the emerging APAC market (12%)
- Industries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

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

Assessment of Advanced Analytics & Insights services



- 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

XXX | advanced analytics & insights services profile (page 1 of 2)

Overview

Strengths

- XXX operates in the market with an analytics-first approach and is building its capabilities to drive business outcomes through advanced analytics offerings supported by digital technologies such as AI and automation
- Has strengthened its offerings for advanced analytics by aggressively building use case- and industry-specific IP
- Is effectively communicating the ability to deliver value to its clients by offering innovative pricing models such as outcome-based pricing and solution co-creation

Areas of improvement

- Its onshore presence
- XXX has partnered. However, it relatively hiring

Percentage of revenue by industry

Industry	Revenue Level
BFSI	High (>25%)
Energy and utilities	Medium (10-25%)
Manufacturing	Low (<10%)
Public sector	High (>25%)
Travel & transport	Medium (10-25%)
Electronics, hi-tech, & technology	Low (<10%)
Healthcare and life sciences	High (>25%)
Retail, distribution, and CPG	Medium (10-25%)
Telecom, media, and entertainment	Low (<10%)
Others	High (>25%)

Percentage of revenue by geography

Percentage of revenue by buyer size

Buyer Size	Percentage
Small (annual revenue < US\$1 billion)	~1%
Medium (annual revenue = US\$1-5 billion)	~1%
Large (annual revenue > US\$5 billion)	94%

Percentage of revenue by customer type

Customer Type	Percentage
Customer, sales, and Risk, fraud, and compliance	~1%
Supply chain, operations, and Others	~1%

Source: Everest Group (2019)

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XXX | advanced analytics & insights services profile (page 2 of 2)

Offerings

IP portfolio overview

XXX has domain-specific solutions such as functional frameworks designed for banking and financial services, telecom, healthcare and life sciences, and insurance. Its partner ecosystem comprises of AWS, GCP, Azure, IBM Watson, Oracle, Microsoft, Talend, and several niche data and analytics providers.

Proprietary solutions (representative list)

Solution name	Details
vLife research platform	Ingests key sales-related data sources, including siloed CRM, ERP, and similar data sources, and leverages toolsets and accelerators to provide historical and predictive analytics and AI/ML driven insights for pharma companies.
Accelerate	Enables organizations to implement data science initiatives leveraging best practices, reusable assets, and internal collaboration. Provides a uniform interface for model creation and model deployment using the Jupyter notebook interface. Facilitates code reusability and automation of common tasks and simplifies data and model versioning for better data science asset management.
Open Innovation Platform (OIP)	Promotes enterprise-wide innovation by partnering with selected FinTechs, RegTechs, and InsureTechs through its Lean Agile Model and integrated development.

Analytics and Insights services investments (representative list)

Investment area	Details
Labs	xLabs is the digital innovation hub within Virtusa that provides a cloud-based environment with a built-in open API layer and microservices sandbox, modular AI components, blockchain capabilities, and a banking model dataset enabling clients to run quick experiments and turn ideas into practice.
Acquisition	Acquired eTouch, a technology services company that specializes in digital web engineering. The addition of eTouch's Digital Innovation Center strengthens Virtusa's capacity to guide multi-national clients around the world, expands its digital engineering expertise, and broadens its digital service offerings.
Academic Partnerships	Collaborated with Oxford University to create a Digital Maturity Assessment Model (DMAM) to help global businesses with digital transformation. Signed an MoU with IIT-B to promote research on emerging technology areas by composing solutions and debating academically on future-forward solutions in IoT, machine data analytics, and AI.

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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	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 [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. 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.

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