

***ISG** Provider Lens™

Data Analytics Services & Solutions

Data Driven Business Model Transformation
Consulting & Integration

U.S. 2019

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:

Infosys®

November 2018

About this Report

Information Services Group, Inc. is solely responsible for the content of this report.

Unless otherwise cited, all content, including illustrations, research, conclusions, assertions and positions contained in this report were developed by and are the sole property of Information Services Group, Inc.

The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that was current as of August 2018. ISG recognizes that many mergers and acquisitions have taken place since that time but those changes are not reflected in this report.

The lead author for this report is Ashish Chaturvedi. Editors are Jan Erik Aase and John Burnell. The support analyst is Arul Manoj and data analyst is Kankaiah Yasareni.



ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strength and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under [ISG Provider Lens™](#).



ISG Research™ provides subscription research, advisory consulting and executive event services focused on market trends and disruptive technologies driving change in business computing. ISG Research™ delivers guidance that helps businesses accelerate growth and create more value.

For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +49 (0) 561-50697537 or visit research.isg-one.com.



- 1** Executive Summary
- 3** Introduction
- 13** Data Driven Business Model Transformation Consulting & Integration
- 17** Methodology

© 2018 Information Services Group, Inc. All rights reserved. Reproduction of this publication in any form without prior permission is strictly prohibited. Information contained in this report is based on the best available and reliable resources. Opinions expressed in this report reflect ISG's judgment at the time of this report and are subject to change without notice. ISG has no liability for omissions, errors or completeness of information in this report. ISG Research™ and ISG Provider Lens™ are trademarks of Information Services Group, Inc.



EXECUTIVE SUMMARY

In today's digital age where consumer preferences and engagement channels are changing rapidly, ISG believes the focus at many U.S. enterprises is shifting to leveraging information that can quickly add value to the business. The insights and intelligence developed from historical and real-time data analytics is already proving to be a valid, and increasingly significant, revenue stream for financial services firms, social media providers, entertainment firms and logistics and transportation services providers. With the proper analytics, data becomes both content and process.

Here is a summary of our findings from various segments of the data analytics market.

Data-Driven Business Model Transformation Consulting and Integration

Organizations are seeking new methods to exploit internal and external data as a main source for devising innovative service business models. For transformation to take place, organizations are putting a lot of emphasis on covering the entire data lifecycle. The lifecycle includes data storage (including creating data lakes and data marts), data streaming, data exploration and statistical analysis to generate insights. In the past two to three years, many service providers have developed new frameworks and tooling that integrate and orchestrate different software elements from third-party vendors to execute a full-fledged data-driven transformation. By using smart insights, organizations are discovering new revenue streams; for example, a telco using customer data to provide location-based

marketing services, or a utility company using smart meters for household consumption monitoring and load optimization. Business models driven by data analytics are empowering organizations to experiment more with upcoming product and service offerings, business lines and service channels. Analytics is helping businesses determine what is working and what needs to change – quickly enough to minimize negative impacts.

BI Platform As-A-Service

Initially, the primary reason for growing adoption of a business intelligence (BI) platform as-a-service was simple – to extract the full-fledged benefits of a BI solution with the commercial flexibility and deployment simplicity associated with cloud. However, very recently organizations have started realizing there are many benefits, such as:

- The solution allows data to be seamlessly extracted from multiple sources that are distributed across multiple locations.
- Organizing, joining and hosting data via well-designed data warehouse leads to high performance.

Most of the products available in this space are being sold based on their ease of deployment, integration capabilities, scalability and in-depth reporting features.

Machine Learning as-a-Service

Although, machine learning as-a-service offerings are still evolving, many organizations are jumping onto the bandwagon because of the low investment required and the convenience provided by as-a-service options. Machine learning as-a-service is mostly offered by automated and semi-automated public cloud platforms like Amazon, Microsoft and Google. One of the major reasons for rapid MLaaS adoption is that many clients already use IaaS and PaaS from the leading vendors and adding one more microservice from the catalog is not a big effort. With limited machine learning talent available to hire, along with its high price tag, clients will continue to choose, invest and use machine learning services from leading public cloud vendors.

Social Analytics

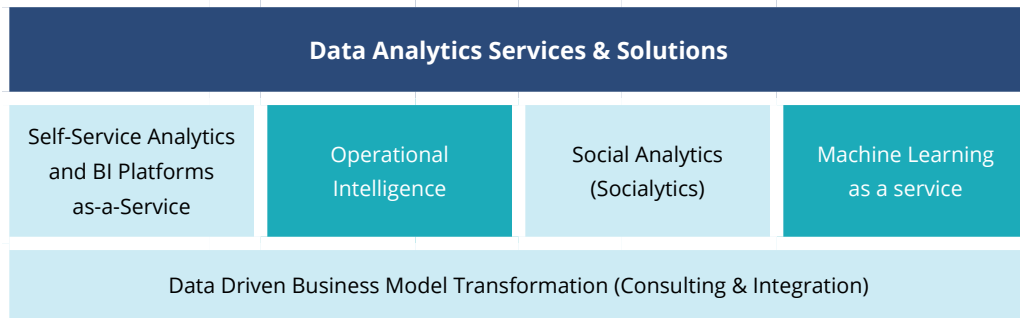
Social analytics is evolving as a primary tool for organizations to form deeper understandings of their customers, in turn leading to better campaign performance, improved customer acquisition and retention and mitigated risks. Some of the social analytics services currently in high demand include social listening, audience analytics, visual listening and sentiment analysis. This space is still evolving and vendors are continuously upgrading their products to add features for enhancing the converged media experience, understanding implicit consumer actions and discovering new revenue channels.

Operational Intelligence

Operational intelligence (OI) is gaining traction as organizations focus more on swift actions and fast recognizable benefits via analytics. OI is enabling organizations to process massive data in real-time to identify important signals, patterns and trends on the spot. It makes use of predictive and what-if analyses to take action based on recommendations. Pursuit of the real-world benefits of OI is also leading to increasing adoption of related technologies such as Internet of Things (IoT), which essentially looks to capture and share data in real-time. Operational intelligence vendors are trying to differentiate themselves through the quality and accuracy of the insights generated by their respective products.

Introduction

Simplified illustration



Source: ISG 2018

Definition

Data analytics refers to processing and examining data sets to draw conclusions. Organizations are making use of various data analytics services in the market to achieve one or more of the following: improving operational efficiency, monetizing findings, introducing new services, improving product or services, cost containment, reducing customer churn rates, fraud detection, achieving customer centricity compliance in real-time or predicting future success or failure.

Scope of the Report

This report will attempt to understand, analyze and evaluate the various platforms and services falling under the data analytics umbrella and being adopted by clients to overcome real-world digital challenges.

Definition (cont.)

Data-Driven Business Model Transformation Consulting & Integration

This category consists of IT services that focus on big data consulting and integration to help customers advance existing and develop new data-driven IT systems. Besides respective consulting and integration competencies, key requirements include the comprehensive technical understanding necessary to transform complex data into valuable information. These are tested and proven services to provide digital transformation support, based on data-driven new business processes or models within the context of current IT trends.

BI Platform as-a-Service

The BI Platform-as-a-Service category, also referred to as self-service analytics, examines providers of products, solutions and services that offer business intelligence (BI) and business analytics functionality for complex analyses of large amounts of multi-structured data, based on an “as-a-service” model.

Machine Learning as-a-Service

The Machine Learning-as-a-Service category (MLaaS) includes providers with solutions that can be used to prepare and analyze sensor and machine data to create new insights and derive improvements for future recurrent, similar events.

Social Analytics

Social analytics describes the basic preparation of unstructured data from social media content by tagging, syndicating and aggregating the respective input (for example, images, texts, videos and others) to make structured derivations. The derivations can be used, for example, for product lifecycle management, sentimental analysis or product and service marketing. The goal is to detect trends early, prevent crises and reveal correlations through predictive analytics.

Operational Intelligence

The operational intelligence (OI) category analyzes providers of products, solutions and services that offer dynamic real-time analyses for data feeds from business event data to help monitor business activities and detect events that reveal inefficiencies or indicate potential threats. The goal is to allow companies to find or derive operational solutions early.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

Market Challenger

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders”. Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising Stars are mostly product challengers with high future potential. When receiving the "Rising Star" award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the "Rising Star" has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Data Analytics Services & Solutions -Quadrant Provider Listing 1 of 5

	Data Driven Business Model Transformation	Machine Learning as a Service	Operational Intelligence	Self-Service-Analytics and BI Platforms as a Service	Social Analytics (Socialytics)
Accenture	● L	● Not in	● Not in	● Not in	● Not in
Alteryx	● Not in	● MC	● MC	● MC	● Not in
Atos	● L	● Not in	● Not in	● Not in	● Not in
AWS	● Not in	● L	● PC	● PC	● Not in
Birst	● Not in	● Not in	● C	● C	● Not in
Brandwatch	● Not in	● Not in	● Not in	● Not in	● L
Buffer	● Not in	● Not in	● Not in	● Not in	● PC
Capgemini	● L	● Not in	● Not in	● Not in	● Not in
Clearstorydata	● Not in	● Not in	● C	● Not in	● Not in
Cognizant	● L	● Not in	● Not in	● Not in	● C`
Dataiku	● Not in	● C	● Not in	● Not In	● Not In

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star

Data Analytics Services & Solutions -Quadrant Provider Listing 2 of 5

	Data Driven Business Model Transformation	Machine Learning as a Service	Operational Intelligence	Self-Service-Analytics and BI Platforms as a Service	Social Analytics (Socialytics)
Datameer	● Not in	● Not In	● C	● C	● Not In
Domo	● Not in	● Not in	● Not in	● C	● Not in
DXC Technology	● L	● Not in	● Not in	● Not in	● Not in
Google	● Not in	● C	● Not in	● PC	● Not in
H2O.AI	● Not in	● RS	● Not in	● Not in	● Not in
HCL	● MC	● Not in	● Not in	● Not in	● Not in
Hexaware	● C	● Not in	● Not in	● Not in	● Not in
Hootsuite	● Not in	● Not in	● Not in	● Not in	● L
IBM	● L	● L	● L	● L	● L
Infinite	● C	● Not In	● Not in	● Not in	● Not In
Infosys	● L	● Not In	● Not in	● Not in	● Not In

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star

Data Analytics Services & Solutions -Quadrant Provider Listing 3 of 5

	Data Driven Business Model Transformation	Machine Learning as a Service	Operational Intelligence	Self-Service-Analytics and BI Platforms as a Service	Social Analytics (Socialytics)
Lithium	● Not in	● Not in	● Not in	● Not in	● L
LTI	● PC	● Not in	● Not in	● Not in	● Not in
Mathworks	● Not in	● C	● Not in	● Not in	● Not in
Microsoft	● Not in	● L	● MC	● L	● Not in
MicroStrategy	● Not in	● Not in	● Not in	● PC	● Not in
Mindtree	● PC	● Not in	● Not in	● Not in	● Not in
NTT DATA	● MC	● Not in	● Not in	● Not in	● Not in
Oracle	● Not in	● Not in	● Not in	● Not in	● MC
Qlik	● Not in	● Not in	● Not in	● RS	● Not in
Rapidminer	● Not in	● PC	● Not in	● Not in	● Not in
Salesforce	● Not in	● Not in	● Not in	● Not in	● MC

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star

Data Analytics Services & Solutions -Quadrant Provider Listing 4 of 5

	Data Driven Business Model Transformation	Machine Learning as a Service	Operational Intelligence	Self-Service-Analytics and BI Platforms as a Service	Social Analytics (Socialytics)
SAP	● Not in	● L	● L	● L	● Not in
SAS	● Not in	● MC	● Not in	● L	● Not in
Sisense	● Not in	● Not in	● PC	● PC	● Not in
SocialHub	● Not in	● Not in	● Not in	● Not in	● C
Software AG	● Not in	● Not in	● L	● Not in	● Not in
Sprinklr	● Not in	● Not in	● Not in	● Not in	● PC
Sprout Social	● Not in	● Not in	● Not in	● Not in	● C
Tableau	● Not in	● Not in	● Not in	● L	● Not in
Talkwalker	● Not in	● Not in	● Not in	● Not in	● PC
TCS	● L	● Not in	● Not in	● Not in	● Not in
Tech Mahindra	● MC	● Not in	● Not in	● Not in	● Not in

● L - Leader / ● PC - Product Challenger / ● C - Contender / ● MC - Market Challenger / ● RS - Rising Star

Data Analytics Services & Solutions -Quadrant Provider Listing 5 of 5

	Data Driven Business Model Transformation	Machine Learning as a Service	Operational Intelligence	Self-Service-Analytics and BI Platforms as a Service	Social Analytics (Socialytics)
Teradata	● Not in	● MC	● Not in	● Not in	● Not in
TIBCO	● Not in	● C	● Not in	● L	● Not in
Wipro	● L	● Not in	● Not in	● Not in	● Not in
Yash Technology	● C	● Not in	● Not in	● Not in	● Not in
Yellowfin	● Not in	● Not in	● C	● Not in	● Not in
Zensar	● C	● Not in	● Not in	● Not in	● Not in

● L – Leader / ● PC – Product Challenger / ● C – Contender / ● MC – Market Challenger / ● RS – Rising Star



Data Analytics Services & Solutions Quadrants

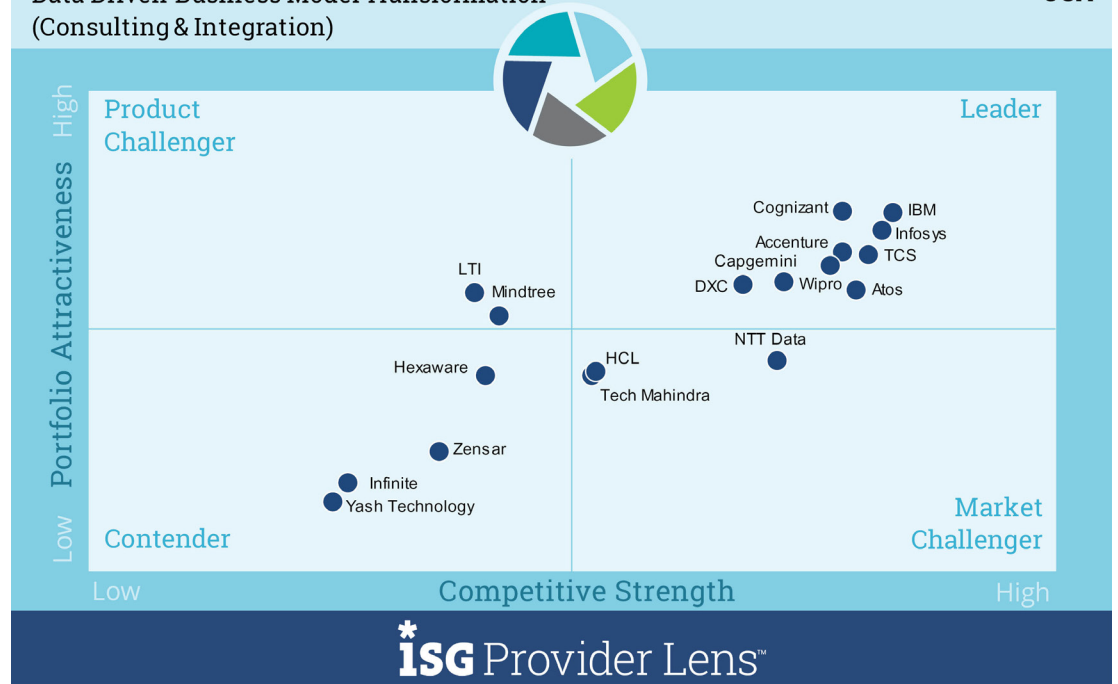
**DATA DRIVEN BUSINESS MODEL TRANSFORMATION
CONSULTING & INTEGRATION**

Definition

Data analytics refers to processing and examining data sets to draw conclusions. Organizations are making use of various data analytics services in the market to achieve one or more of the following: improving operational efficiency, monetizing findings, introducing new services, improving product or services, cost containment, reducing customer churn rates, fraud detection, achieving customer centricity compliance in real-time or predicting future success or failure.

Data Analytics Services and Solutions
Data Driven Business Model Transformation
(Consulting & Integration)

2019
USA



Source: ISG Research 2018

DATA DRIVEN BUSINESS MODEL TRANSFORMATION CONSULTING & INTEGRATION

Observations

- In the wake of digitization and the resulting exorbitant growth in data volumes, consulting services for data-driven business models and business model development has become an important market segment for IT consultants. Although technical components and issues are always relevant for automated analysis of very large data volumes, the focus is increasingly on strategy consulting.
- This market has reached a certain maturity and stability. While initially technical consulting and information on potential big data use cases were in great demand, clients now need strategic support to develop new business models that are based on targeted derivations of identifiable data patterns. Business process restructuring and development are as important as long-term integration.
- Intelligent linkage to existing business models, and deriving new opportunities from them, is becoming increasingly important, which has been illustrated in many examples. For example, IT consulting houses that have big data portfolios must be familiar with service

desk and CRM bots, predictive maintenance, security and cognitive computing to meet service level and compliance requirements. They also must be aware of data autonomy issues to address consumer protection concerns.

- Accenture's rich platform-based IP, robust applied intelligence and digital transformation practice and leadership give it a distinct advantage in the U.S. data analytics market.
- Atos' digital transformation factory approach, cloud partnerships and recent acquisition of Syntel will help it gain new business in the U.S.
- Capgemini is set to gain more popularity in the data analytics space based on its strong skills portfolio and focus on developing industry-specific offerings.
- Cognizant's impressive tools, partner ecosystem and human-centric approach to analytics-driven engagements make it a leader.
- DXC's experience coupled with platform-based services and analytics migration factory are making it successful in the market.

DATA DRIVEN BUSINESS MODEL TRANSFORMATION CONSULTING & INTEGRATION

Observations (cont.)

- IBM is far ahead of the competition in terms of innovation, range of offerings and presence in other analytics-related technology areas, such as cognitive and automation technologies.
- The ability to develop boundaryless platforms, create intellectual property like Nia and recent investments are Infosys' key performance levers.
- TCS' prebuilt tooling, domain expertise and skills training make it a commendable choice in the data analytics space.
- Wipro's data delivery platforms, talent building initiatives and experience in handling mega analytics engagements help it score over competition.



INFOSYS

Overview

Infosys' Data and Analytics (DNA) unit offers an array of services that includes data monetization, data modernization, data consulting and data operations. The unit generated approximately \$870 million revenue in 2017 from approximately 450 U.S. clients.

Infosys' primary on-shore delivery centers locations for DNA are located in California (separate offices in Sunnyvale, Redwood and Irvine); Atlanta; Charlotte; Plano, Texas; Bellevue, Washington; Phoenix; Houston and Milwaukee.

Strengths

Ability to develop boundaryless data platforms: Boundaryless platforms include rapid big data ingestion, intelligent data lake stores and agile data science sandboxes. These are engineered with multi-point ingestion and metadata-driven, automated compute pipelines. These platforms enable seamless rollout of self-service BI, analytics and data marketplaces. The platforms are amplified by data democratization capabilities, analytics driven operational optimization, unique information delivery experiences and next-gen data governance on cloud, on-premises or hybrid data ecosystems.

Infosys Nia: Infosys' Nia open source analytics platform can operationalize data assets. Nia encapsulates functionalities for data preparation, data integration, modelling, deployment and reports.

Investments: Infosys' acquisition of Noah, WONGDOODY and Fluidio, and its investment in startups including Waterline and Trifacta, have augmented its business analytics, consulting and cloud capabilities.

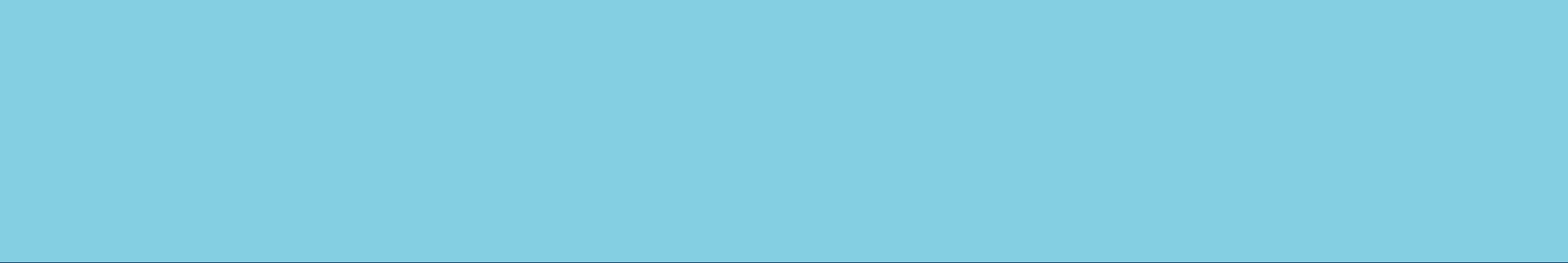
Caution

Infosys can enhance its offerings in areas of adaptive security, conversational AI and provider hosted services.



2019 ISG Provider Lens™ Leader

Infosys' 100X blueprint has a real value proposition for bringing together a large pool of data scientists with right mix of domain, technology and data science skills, coupled with more than 400 software assets, reusable models and industry solutions.



Methodology

METHODOLOGY

The ISG Provider Lens™ 2019 – Data Analytics Services & Solutions research study analyses the relevant software vendors and service providers in the US market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:



1. Definition of Data Analytics Services & Solutions
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements

Authors and Editors



Ashish Chaturvedi, Lead Author

Principal Analyst

Ashish Chaturvedi is a DIGITAL XPERT and Principal Analyst at ISG with over 8 years of experience spanning IT sourcing, technology and industry research. In his current role, Ashish is responsible for authoring thought leadership papers and provider intelligence reports (i.e. Archetypes and Quadrants) in areas of Next-gen ADM and Data Analytics. He has authored several research papers in the realm of Enterprise applications, Cognitive technologies, and Big Data. He is also a member of IDG influencer network (CIO.com).



Jan Erik Aase, Editor

Editor

Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, a services provider, an ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric archetype reports and the worldwide quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.

ISG Provider Lens™ | Quadrant Report November 2018

Proprietary and Confidential

ISG Confidential. © 2018 Information Services Group, Inc. All Rights Reserved



ISG (Information Services Group) (NASDAQ: III) is a leading global technology research and advisory firm. A trusted business partner to more than 700 clients, including 75 of the top 100 enterprises in the world, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; technology strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.