

Analytics Services

Data Science Services - Midsize

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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CDOs will invest in analytics-led transformation programs to enable data and AI-driven decision intelligence.

The analytics services market in Europe saw significant traction and demand, which empowered providers to innovate and revolutionize to address enterprise challenges in sub-optimal utilization of the data and analytics investments. ISG's analysis indicates that enterprises in Europe continue to face challenges like their counterparts in other regions. However, the market shows a clear distinction in approach and investments, given the varied levels of analytics maturity among large and midsize enterprises.

Enterprises in Europe face multidimensional challenges spanning geopolitical tensions, economic uncertainties, rising operating costs, supply chain disruptions, and environmental regulations and sustainability practices. The economic outlook uncertainties, including volatile currency value and market dynamics,

disrupt operations and planning, thereby creating a challenging environment for enterprises in Europe. Enterprises also need to navigate the escalating operational costs resulting from macroeconomic factors such as fluctuating energy prices and shifts in labor costs. The increased awareness of environmental compliance has triggered a drastic shift toward sustainable practices. Enterprises in Europe are confronted with the peculiar challenge of aligning their operational strategies and methods to comply with stringent environmental norms and regulations. Recognizing the need, enterprises need to mandate a fundamental reevaluation of production processes, supply chain management and product offerings to ensure adherence to green standards.

Therefore, the approach to identifying challenges and the ensuing activities to ensure effective operational performance, reduced costs, increased governance and enhanced CX largely aligned with the enterprise's analytics maturity. The market highlights the need to accommodate and align with the global trends in fostering data-centricity and a data-driven culture.

Analytics initiatives are foundations for **comprehensive business and digital transformation.**



ISG has identified the following challenges enterprises face:

Analytics spending and rationalizing investments:

European enterprises see heightened consciousness of technology spending amid rising fear of a potential recession and prevailing economic headwinds. These uncertainties directly impact the budget for analytics spending and restrain CDOs' ability to invest in analytics tools. Enterprises in Europe are strategically focused on maximizing the utilization of their existing data and analytics investments and tools, reflecting a prudent and cost-effective strategy and deliberate effort to rationalize and optimize data and technology assets. This emphasis on seeking to extract optimal value from their current data and technology assets in the face of economic challenges signifies the importance of rationalizing data assets.

Adoption of enterprise-wide analytics:

Many European firms are confronted with the imperative of undergoing analytics adoption and transformation, which involves adopting cutting-edge technologies, churning out legacy systems, and instilling a digital

mindset and culture within the enterprise. The adoption of analytics tools and systems demands a substantial upgrade of their existing infrastructure, involving careful engineering and integration of data assets. This process requires meticulous planning, technical expertise and execution to ensure that the upgraded infrastructure effectively supports the analytics tools' functionalities and provides the necessary foundation for data-driven decision-making. Cultivating a digital mindset necessitates a cultural shift, requiring employees to adapt to and embrace a more data-driven approach to business processes. Overcoming these challenges is crucial for enterprises aiming to harness the full potential of analytics and position them competitively in the evolving market.

Efficient systems and models for use

cases: Enterprises in Europe are hurdled with numerous challenges across business functions, including, but not limited to, expense efficiency, productivity, market expansion, product diversification, adaptability, innovation and operational agility. Enterprises must address these challenges, and this

requires robust strategic planning, leveraging technology, and fostering a culture of innovation and adaptability. European firms need to find a balance between compliance, cost-efficiency and innovation to thrive in a competitive and dynamic business landscape. Firms need to invest in technology-driven applications that facilitate swift transformation and automate every component of the business value chain.

High technology infrastructure costs:

Technology infrastructure costs are drifting higher as enterprise data volumes are expanding. Managing these expenses through strategic decision-making can lead to efficient and cost-effective solutions that support business objectives. European firms need to forecast future infrastructure needs and associated costs based on historical data and trends that could assist in better budgeting and planning. This could aid business users with comprehensive data analysis, enabling them to make informed decisions about technology spending and strategies while considering cost implications.

Dynamic changes in data compliance and regulations:

Data regulations and compliance are often complex, requiring a deep understanding. Applying them is more challenging for enterprises that handle diverse data sets and operations. The landscape of compliance and data regulations is dynamic, as regulatory bodies are introducing new requirements, posing significant challenges for enterprises. As data assets are siloed across the enterprise, it is difficult to meet compliance standards for data integration and management across sources. Data complexity and massive data volumes make adherence more challenging. Addressing the changes requires a proactive approach as enterprises need to update, adapt and align with these regulatory and compliance changes.

New revenue streams: Many enterprises in Europe struggle to identify markets and niche segments that are untapped at present. The challenge is largely in identifying and capitalizing on opportunities that can significantly impact their revenue streams. Investment in analytics yielded robust insights on identifying the uncatered markets and



segments and also led to the development of new products and solutions, creating new revenue streams. Enterprises can also monetize their data and create additional revenue streams by selling data-related products and services through packaged data as reports or insights; providing subscription-based access to data platforms; licensing secure data access; partnering for joint services; and providing targeted customer insights.

Skill and talent gap: The continuous advancements in digital technologies such as generative AI (GenAI), ML and big data analytics necessitate specialized expertise. While European enterprises rapidly embrace these technologies, there is a substantial shortage of skilled professionals with these niche skill sets. The exponential surge in data volumes further demands proficient advanced technology and digital professionals capable of effectively managing, analyzing and extracting valuable insights from extensive and complex data assets. This shortage of skilled talent poses a significant obstacle for businesses aiming to fully harness the potential of these cutting-edge technologies, impeding their

ability to capitalize on the wealth of data and information available and, in turn, hindering innovation and competitive edge.

CDOs are actively seeking the following solutions to enhance their current circumstances in handling data, particularly to incorporate business transformation through AI/ML-led enhancements. They are keen on solutions that empower them to derive meaningful insights, foster innovation and drive strategic decision-making through their data initiatives.

Aligning with business objectives and KPIs: CDOs are looking for solutions that help them better prioritize their data-centric initiatives and align them with enterprise business objectives. Service providers can equip enterprises to establish a solid foundation to build their AI strategy utilizing their IP assets such as accelerators, frameworks and platforms that are powered by digital technologies like AI/ML, deep learning, NLP and computer vision. Establishing key performance indicators (KPIs) is critical to validate the alignment with business goals. KPIs can include metrics related to revenue growth, customer retention,

operational efficiency, cost savings and improved decision-making to track the impact of AI initiatives in real time and make data-driven adjustments to ensure continuous improvement.

Unlock analytics investments: Enterprises aim to foster an innovation mindset and culture that significantly pushes them to invest in digital capabilities, analytics and AI. They want to unlock value quickly, responsibly and sustainably from analytics to embrace an AI-led operating model. Service providers can help enterprise shift their approach to deliver impactful data-driven decisions at a considerably reduced cycle time. Enterprises aim to realize and unlock value from existing data and analytics investments in identifying new business opportunities and optimizing processes utilizing advanced analytics technologies.

AI and automation-driven intelligence: European enterprises aim to adapt to an AI-driven approach for operational decision-making, fully utilizing the value of data, including AI, in their workflows and processes. The evolution to an AI-driven approach

amplifies the swift processing of structured data, augmenting human intelligence, decision-making and problem-solving capabilities utilizing AI algorithms, ML models, NLP and other advanced analytics to process vast amounts of data, recognize patterns and generate insights. Service providers are highly equipped to drive the entire transformation that could further lead to automated decision intelligence.

Decision-making with real-time insights generation: Real-time insights provide enterprises with instant updates on information that enables proactive decision-making and rapid response to market dynamics. Service providers have invested and developed capabilities to overcome the limitations of batch processing and delayed reporting, which causes lags in decision-making that cost time and resources. Enterprises need to be equipped with complex event processing, large-language models (LLM), GenAI, ML, NLP and other advanced analytics capabilities to derive actionable real-time insights from streaming data for agile decision-making with higher accuracy.



Robust data architectures and governance:


Enterprises need to democratize data management, envisioning data not in silos but freely accessed between different systems, applications and users. Data mesh architecture shifts toward automated analytics at scale, delegating dataset ownership from centralized to individual teams or business users, enabling agility and scalability within a decentralized governance framework to power real-time decision-making in businesses.

Notes on quadrant positioning: In this study, several data analytics service providers that offer similar portfolio attractiveness in most quadrants have been assessed. This reflects the relative maturity of the market, providers and offerings. It is a given that not all are equal in circumstances. The vertical axis positioning in each quadrant reflects ISG's analysis of how well the offerings align with the full scope of enterprise needs. The market has also been segmented into large, mid-market and specialists to showcase the varying analytics requirements of enterprises based on their size, scale and industry dynamics.

It also reflects providers' strategy to align their portfolio and offerings to suit market demand and enterprise needs.


Depending on analytics maturity, the investment in analytics is primarily targeted at data-driven decision-making for mid-level enterprises and business transformation or reinvention for large enterprises that are becoming data-centric. While data-driven organizations rely completely on data for business and operational decisions, data-centric organizations approach data as a core and independent asset, viewing it as a product.



 Provider Positioning


	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
Accenture	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
adesso SE	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Contender
Alexander Thamm	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In
Atos	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
b.telligent	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In
Birlasoft	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
BJSS	Not In	Product Challenger	Not In	Not In	Contender	Not In	Not In	Contender
Brillio	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
Capgemini	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In



 Provider Positioning


	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
CGI	Leader	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Cognizant	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
Deloitte	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
doubleSlash	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Not In
DXC Technology	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
EPAM Systems	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
EXL	Contender	Not In	Not In	Contender	Not In	Not In	Contender	Not In
EY	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Fractal	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In



 Provider Positioning


	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
Genpact	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
GFT	Not In	Market Challenger	Not In	Not In	Not In	Not In	Not In	Not In
HARMAN DTS	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
HCLTech	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
Hexaware	Not In	Not In	Not In	Not In	Leader	Not In	Not In	Leader
Hitachi Digital Services	Contender	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
IBM	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Infosys	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
ITC Infotech	Not In	Rising Star ★	Not In	Not In	Rising Star ★	Not In	Not In	Contender



 Provider Positioning


	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
it-novum	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Contender
Keyrus	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger
KPMG	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Kyndryl	Product Challenger	Not In	Not In	Contender	Not In	Not In	Contender	Not In
LTIMindtree	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Marmeladenbaum GmbH	Not In	Not In	Product Challenger	Not In	Not In	Contender	Not In	Not In
MathCo	Not In	Not In	Rising Star ★	Not In	Not In	Rising Star ★	Not In	Not In
Mphasis	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
Mu Sigma	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In



 Provider Positioning


	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
N-iX	Not In	Not In	Contender	Not In	Not In	Contender	Not In	Not In
NTT DATA	Rising Star ★	Not In	Not In	Rising Star ★	Not In	Not In	Rising Star ★	Not In
OPITZ CONSULTING	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Not In
Orange Business	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
Persistent Systems	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
pmOne	Not In	Not In	Contender	Not In	Not In	Contender	Not In	Not In
PwC	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Quantiphi	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In
Reply	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In



 Provider Positioning

	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
Sigmoid	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
SLK Group	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
Sopra Steria	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Not In	Not In
STATWORX	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Stefanini	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Contender
TCS	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
Tech Mahindra	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
Tiger Analytics	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In
Tredence	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In



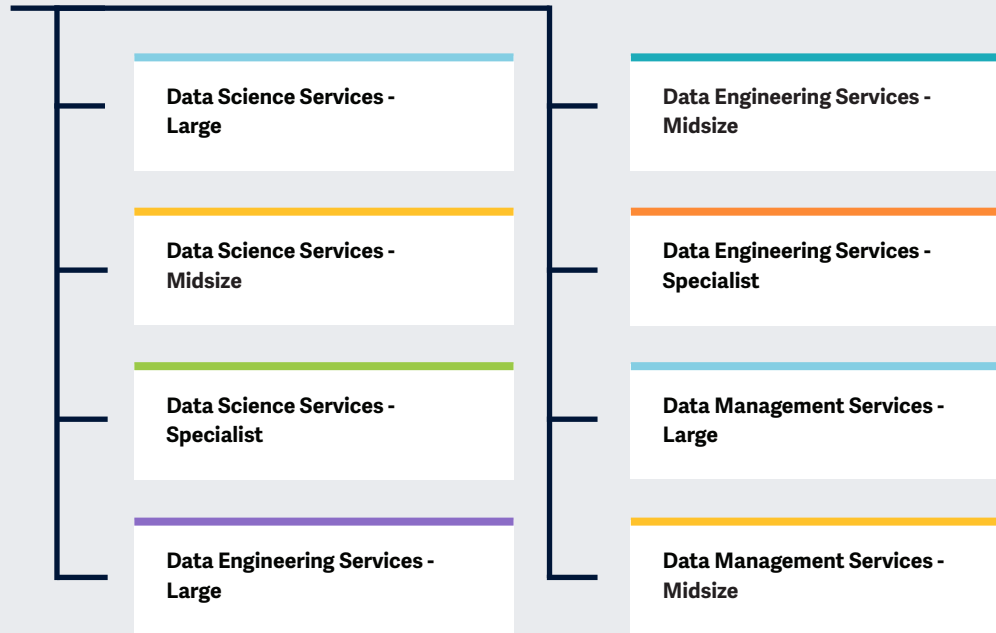
 Provider Positioning

	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
UST	Contender	Product Challenger	Not In	Contender	Product Challenger	Not In	Contender	Contender
Virtusa	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
Wavestone	Not In	Contender	Not In	Not In	Not In	Not In	Not In	Contender
Wipro	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
WNS	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger
Zensar Technologies	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
ZS	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In



The report provides insights into the **evolving market trends** and **competitive dynamics** among providers of Analytics Services in 2023.

Simplified Illustration Source: 2023



Definition

The year 2023 continues to witness economic headwinds with increased inflation, while the global economy exhibits signs of resilience, with enterprises becoming cautious about IT transformation expenditure. This scenario is further complicated by increased hypercompetition among enterprises and tech-savvy startups and consumers' hyperpersonalization needs. With enterprise budgets strapped, business leaders show more value for their existing investments in digital technologies and focus on enhancing CX, cost optimization and cybersecurity to ensure business and operational resilience. ISG analysis reveals that this is an opportune time for enterprises to revisit their analytics strategies and increase spending on analytics services and solutions to enhance data-driven approaches and solve business challenges. Data science services are gaining significant traction, aligning business objectives with underlying data and helping enterprises derive decision intelligence and evaluate business impact. Enterprises expect providers to identify relevant business use cases, offer AI



and ML modeling platforms and engineering capabilities, and deploy these models to production. Data engineering services are in demand owing to several cloud migrations and data modernization investments. The focus will be on achieving high cost and process efficiency optimization levels with traction for FinOps, DataOps and DevSecOps. Data management services are making a significant comeback, with data governance capabilities in demand. Enterprises compete for providers with capabilities in data catalog, data observability, data lineage and business glossary, among other areas that ensure data trustworthiness and availability.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following eight (spell out the number of quadrants, do not use a digit) quadrants for services/solutions: Data Science Services – Large, Data Science Services – Midsize, Data Science Services – Specialists, Data Engineering Services – Large, Data Engineering Services – Midsize, Data Engineering Services – Specialists, Data Management Services – Large, and Data Management Services – Midsize.

This ISG Provider Lens™ study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise

clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between \$20 million and \$999 million with central headquarters in the respective country, usually privately owned.

- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).





Provider Classifications: Quadrant Key

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

★ **Rising Stars** have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not in means the service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.





Data Science Services - Midsize

Data Science Services - Midsize

Who Should Read This Section

In this quadrant, ISG assesses providers offering advisory and system integration services based on data science and evaluates the changing market dynamics Europe. Providers offer data science services typically to mid-market clients to seamlessly integrate technologically advanced methods with their business context. These providers resolve critical business challenges by combining domain knowledge and expertise across industries, enabling them to drive robust business growth through actionable insights.

Enterprises aim to unlock data value through platform modernization, maximizing the value of investments, elevating the CX, and automating data and AI operations. The key objective is envisioning and equipping data intelligence at scale and reimagining AI/ML-led approaches to transform and accelerate the development and operations lifecycle. In response to this, service providers have developed targeted ML-led solutions that can elevate performance, streamline processes and accelerate time-to-market.

Enterprises focus on taking an insights-led approach and driving strategic decision-making for effective productivity and unlocking growth. Service providers aim to integrate GenAI technology, seeking out opportunities for automation within various business processes. This integration helps enterprises automate repetitive workloads. To help enterprises drive transformation, service providers establish specialized AI labs and innovation CoEs and leverage state-of-the-art technologies that can rapidly develop prototype accelerators and frameworks.



IT Leaders should read this report to understand the relative positioning and capabilities of providers that can help effectively plan and improve the reliability and availability of their business.



Chief Data Officers (CDOs) can refer to this report to gain perspective on effective analytics tools and techniques to deliver business outcomes from data assets and ecosystems.

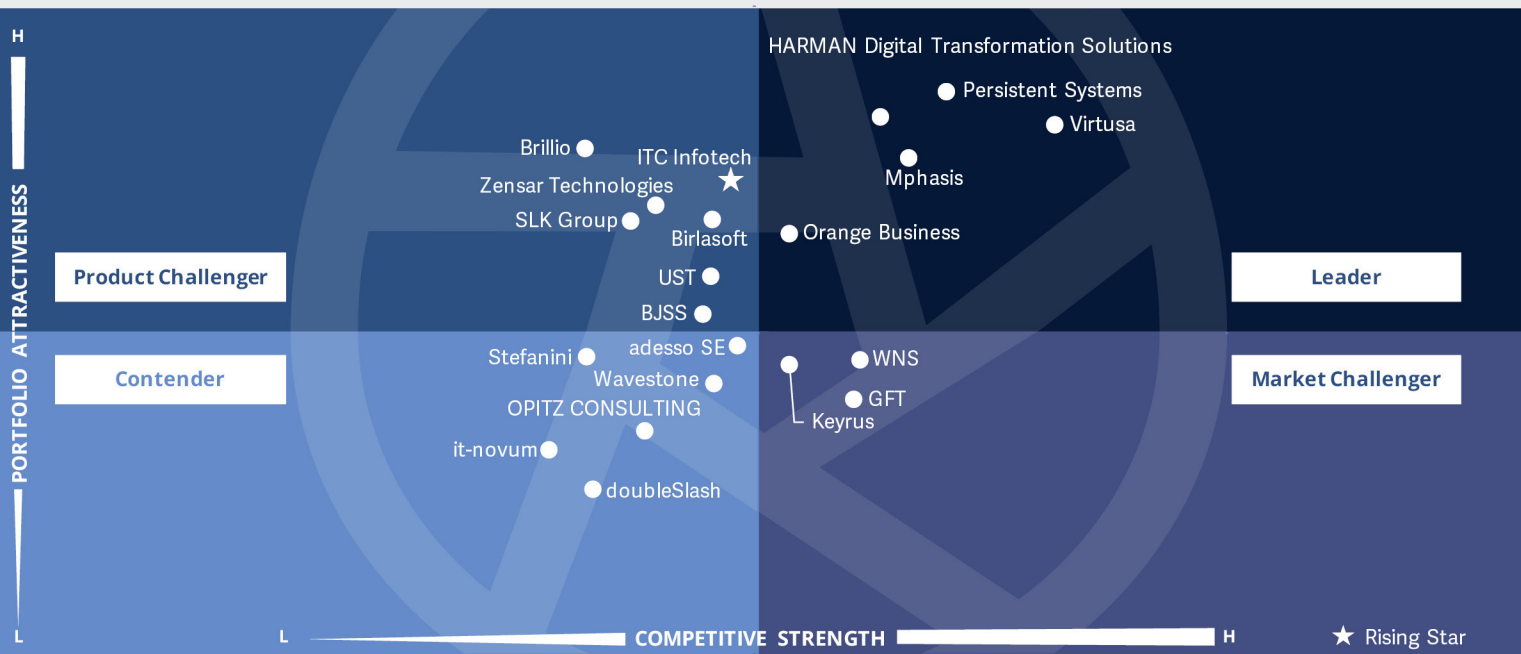


Research and Innovation Professionals should read this report to understand the IP assets such as pre-built solutions and the potential application of AI and ML in automating processes and use cases.



Chief Digital Officers, responsible for strategizing a digital approach, should read this report to better understand the effective analytics tools and techniques that enable frictionless transactions virtually.





This quadrant assesses service providers **with expertise in scientific techniques and advanced technologies such as AI and ML** that support midsize enterprises with **insights and intelligence for decision-making** and gaining transformational value.

Gowtham Kumar Sampath



Data Science Services - Midsize

Definition

In this quadrant, ISG evaluates the provider portfolios offering advisory and system integration services based on data science. Providers qualifying for this quadrant offer services to integrate scientific methods with business context for their clients. These providers resolve critical business challenges by combining domain knowledge and expertise in clients' industries, enabling clients to attain substantial, data-driven business growth through actionable insights. Information generated through data science may even lead to new business models and revenue streams. The objective is to define and deploy contextual questions to extract relevant information from vast data streams — data science leverages structured and unstructured data. Service providers evaluated in this study need to address enterprise requirements, including, but not limited to, consulting, identifying business use cases, and developing statistical models and algorithms. Providers should showcase capabilities to generate and visualize insights that are ready to use for business in the form of intelligent reports and storytelling dashboards.

They should be capable of modeling and customizing ML algorithms and workflows using best-of breeds solutions to deploy their services efficiently. Providers should exhibit end-to-end capabilities in architecting, implementing, deploying and scaling enterprise-wide AI projects. These providers should also offer support and training services as standalone offerings, which differ from other service contracts.

Eligibility Criteria

1. Provide a **structured approach, framework** and service portfolio with proprietary offerings that include but not limited to **industrialized playbooks, AI and ML platforms, accelerators, advanced automation and workbenches**
2. Demonstrate established competence, with **several data science experts**, delivering services and having an **in-depth understanding of the market dynamics, regulatory requirements, and language** necessary to successfully deliver services considered within the scope of these services
3. Possess **technology expertise and business knowledge** of the region- and industry-specific requirements, statistical and mathematical modeling, with independent advisory.
4. Possess expertise and offer solutions for **federated learning, data literacy and advanced analytics (computer vision, audio, NLP, natural language generation [NLG] and Graph DB)**



Data Science Services - Midsize

Observations

Service providers' synergetic integration of expertise with data science and other advanced analytics empower enterprises to foster a proactive approach to decision-making through actionable insights. Enterprises can unlock the true value of data that nurtures the development of AI/ML-based solutions leveraging advanced technologies such as GenAI, NLP, computer vision and deep learning. Service providers have invested significantly in expanding their data science portfolio and developed indigenous cognitive platforms and AI-powered solution accelerators tailored for enterprise-grade integration and innovation. Pre-built accelerators and frameworks promote the rapid development of domain-specific analytics solutions that shape data-centric cognitive enterprises, supporting the advanced approach for business insights and innovation.

Service providers harness the power of GenAI to streamline complex processes and transform innovation and decision-making for enterprises leveraging extensive data heritage to elevate extensive AI experience. Reinforced through partnerships and investments,

service providers have developed a suite of accelerators and industry-specific use cases. They are also actively customizing solutions to cater to unique requirements of enterprises, delivering personalized AI solutions aligned with business objectives. Advancements are evident in explainable AI, auto ML, responsible AI, conversational AI, federated learning, knowledge graphs and omics, with a strategic plan in place to exponentially strengthen the AI capabilities.

From the 105 companies assessed for this study, 21 qualified for this quadrant, with 5 being Leaders and 1 Rising Star.



Harman DTS leverages the power of generative adversarial networks (GANs), variational autoencoders (VAEs), reinforcement learning and quantum computing to fortify enterprise decision-making and tackle intricate challenges through amplified advancements.



Mphasis invests in AI/ML solutions, with a strong focus on scalability, integration and innovation, and aims to excel as a leading ML solutions provider on AWS Marketplace with several listings across industries. It leverages quantum computing for AI/ML advancements.



Orange Business possesses robust capabilities to seamlessly integrate data sources and sophisticated AI models into hyperpersonalized applications, allowing it to offer tailored, meaningful and purpose-driven digital experiences to enterprises.



Persistent Data Experience Hub (DxH) is designed to empower enterprises with a range of tools and capabilities to accelerate the development and deployment of AI and ML solutions, making it accessible for businesses at every stage of their analytics maturity.



Data Science Services - Midsize

virtusa

Virtusa's strength lies in the execution of analytics projects by blending technical expertise with a multidisciplinary approach to harness the power of data. Its strategic data analytic roadmaps for enterprises serve as a guiding framework to leverage data effectively.



ITC Infotech (Rising Star) invests in GenAI CoE to develop rapid prototypes for applications across business functions and domains, thoughtfully aligning to clients' needs. This reflects its proactive approach to harnessing the potential of GenAI.





“Orange Business’ ability to blend trusted data and AI models with hyperpersonalized applications positions it to deliver purposeful digital experiences for enterprises.”

Gowtham Kumar Sampath

Orange Business

Overview

Orange Business is headquartered in Paris, France and operates in 65 countries. It has more than 29,000 employees across over 100 global offices. In FY22 the company generated €7.9 billion in revenue, with IT Services as its largest segment. The company helps customers accelerate their digital transformation, spanning network solutions, data and AI, cloud and service platforms. This helps unlock their innovation potential and support their economic growth in a responsible and sustainable way. It has more than 4,000 data and AI experts worldwide. Harnessing the power of data and AI across enterprises as a digital integrator specializing in data and AI, Orange Business enables and integrates the best technologies that transform data and create value for enterprises.

Strengths

Focus on hyperpersonalization using ML algorithms:

Orange Business delivers exceptional CX by incorporating a data ecosystem that includes optimal coverage of specific user groups, leveraging trusted ML algorithms and behavioral analytics, and generating hyperpersonalized insights on customers. Data-centric approach and ability to ingest large-scale customer metrics and interactions help predict target customers for enterprises.

Predictive analytics through deep-image analysis:

Accurate detection automation through convolutional neural networks and image analysis helps healthcare firms understand, analyze and extract meaningful data from images faster and more accurately than humans. Orange’s

approach of leveraging deep learning models and algorithms delivers exceptional accuracy and automation in healthcare detection automation.

Unstructured information extraction and analysis using NLP:

Orange Business builds NLP into apps to give users a personalized experience in converting human requests into automated actions. The company’s competence in grammatical, syntactic and semantic analysis of language enables NLP-powered chatbots to understand user requests and helps pre-empt questions and uncover unforeseen needs.

Caution

Orange Business should focus more on expanding its industrialized solutions beyond healthcare, financial services, public sector and industrials to support enterprise customers across verticals.





Appendix

The ISG Provider Lens™ 2023 – Analytics Services research study analyzes the relevant software vendors/service providers in the Europe market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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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 ISG believes to be current as of November 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

The study was divided into the following steps:

1. Definition of Analytics Services market
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. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
 - * Strategy & vision
 - * Tech Innovation
 - * Brand awareness and presence in the market
 - * Sales and partner landscape
 - * Breadth and depth of portfolio of services offered
 - * CX and Recommendation



Author & Editor Biographies

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Gowtham Sampath is an Assistant Director and Principal Analyst with ISG Research responsible for authoring ISG Provider Lens™ quadrant reports for Banking Technology/Platforms, Digital Banking Services, Cybersecurity and Analytics Solutions & Services market. With 15 years of market research experience, Gowtham works on analyzing and bridging the gap between data analytics providers and businesses, addressing market opportunities and best practices. In his role, he works with advisors in addressing enterprise clients' requests for ad-hoc research requirements within the IT services sector, across industries.

Furthermore, he authors thought leadership research, whitepapers, articles on emerging technologies within the banking sector in the areas of automation, DX and UX experience as well as the impact of data analytics across different industry verticals.

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Vartika Rai is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Analytics Services, and SAP Ecosystem. She supports the lead analysts in the research process and authors the global summary report. Vartika also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Vartika started her current role in June 2022. Before this role, she worked on secondary research, competitive intelligence, market trends, and newsletter analysis.



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Saravanan has six years of experience and expertise in technology, business and market research and has been associated with technology research firms specializing in sales and talent strategies across industries. He has also spearheaded end-to-end research and consulting projects for global system integrators and enterprise clients.



IPL Product Owner

Jan Erik Aase
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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.



iSG Provider Lens™

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For more information about ISG Provider Lens™ research, please visit this [webpage](#).

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DECEMBER, 2023

REPORT: ANALYTICS SERVICES