

***ISG** Provider Lens™

Analytics Services

Data Engineering Services

Germany. 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



December 2021

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Unless otherwise noted, all turnover are in U.S. dollars (USD).

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- 1** Executive Summary
- 3** Introduction
- 16** Data Engineering Services
- 20** Methodology

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EXECUTIVE SUMMARY

User attention towards analytics remains high. Organizations are beginning to realize the added value of advanced analytics over traditional reports and spreadsheets. Large IT consultancies and IT technology firms form the largest user groups owing to their strong marketing power. At the same time, most organizations face intense competition from newly established ones and the specialists already mentioned. Also, when there are historical or personal references, the main people responsible for special topics such as analytics tend to disengage quickly. In this way, enterprises can apply their strengths to large-scale projects. One of the main priorities of users is the availability of data across all departments.

Those involved in a task should be able to perform data analysis according to their role, from quick reviews of business process data to scenario analysis to analysis of enterprise-wide metrics. From a technological perspective, there are important trends for future projects. One of these include the move to modern development environments that can be developed by users themselves by using a self-help tool. Analytics environments should be able to deliver this capability. Some vendors already offer platforms with low-code and no-code development environments.

Technical innovations for building intelligent analytic environments include DataOps, machine learning operations (MLOps) and DevOps. Providers in this space should be

able to help clients deploy IT environments on-premises and as multi-cloud environments and cross-enterprise data structures. There are also innovations in the implementation – end users in business departments should be able to collect data and present it for analysis through drag-and-drop, point-and-click, self-service, voice-driven AI and natural language queries. These are requirements that service providers should particularly address by providing a broad partner network for infrastructure, implementation and enforcement issues. Well-staffed IT service providers can partially offset the associated expense by deploying many employees.

When it comes to analytic applications, users are becoming familiar with terms such as data monetization, data democratization, and data orchestration. Enterprises want to know the worth of their data in purely pecuniary terms and which ones contain economic information. Although sometimes reluctant, enterprises are moving away from providing company figures to workers for gaining full control. The value of data is becoming increasingly important, both for a company's business processes and results as well as others in the partner network.

Enterprises leverage the expertise and on-site knowledge of their employees to significantly improve the value of analyses and classify them to develop solutions, giving them a competitive edge. Service providers should support this not just from a

management aspect but for all levels through a strong presentation of key performance indicators. They should also master concepts such as RPA, hyper-converged infrastructure (HCI), cloud, AI and machine learning around the analytics solution.

Due to the COVID-19 crisis, several IT projects were postponed. Many enterprise clients were urged to virtualize workstations and set up home offices, leading to various ramifications. Some vendors have succeeded in helping their clients manage the impact of the pandemic by offering analytical solutions. Such services helped users to better analyze and take countermeasures against the risks, such as those posed by supply chain disruptions.

Compared to other countries in the European Union, Germany lags in digitization but is gaining speed. The market has been largely stable at the time this study was prepared. Large enterprises are ahead in their digital transformation journey, but many face challenges due to infrastructure issues. For example, real-time analytics can only be applied in logistics if vehicles are constantly on the grid. This also affects the market for analytical platforms. Companies have a considerable investment backlog, making innovation through analysis time consuming.

However, the market does not completely lack momentum. Startups in the enterprise and solution provider ecosystems are creating movement. The latter may overtake established large full-service providers with individual solution approaches rather than a comprehensive portfolio of solutions and services.

One of the main reasons for the rather stagnant market is the shortage of skilled labor, which is being met by the nearshore and offshore labor of companies with high staffing levels. Part of the service providers' income comes solely from the provision of staff. For example, one service provider stated that 4,000 employees were working on an (analytical) project for a German global player.

In addition, investors face various challenges that are being addressed through innovation support programs, though these are applicable to IT innovations to a certain extent. Analytical solutions can be partially funded under the Research Promotion Act.

In the analytics space, Indian vendors have a sizeable market share. Apart from them, other global suppliers have grown significantly and reached a high level in the application of standard technologies. They should now adapt to the specific needs of German users. The challenges for international suppliers are local staff, German as a negotiating language, and a better knowledge of the sector or the needs of German customers. Providers based in Germany took part in the study less often by actively providing information. The market analysis shows that providers generally offer timely solutions to clients and therefore have a strong market position.

Two key challenges still exist – the lack of skilled resources and the need to reduce workloads. In addition, company staff should be able to use data and receive information. Technical innovations include highly intelligent platforms and the convergence of DataOps,

MLOps and DevOps, multi-cloud data integration and powerful data fabrics. From an operations perspective, the main issue is about involving users in specialty departments. This can be achieved by leveraging platforms that allow users to create analytical dashboards and more complex applications without programming skills.

The transition from a "data-driven" enterprise towards a "data-enterprise" is a new paradigm for analytic IT in the wake of digital transformation. An important prerequisite for this is a solid strategy. Without a well thought out roadmap, many analytical projects are likely to fail. Some users already have a strategy, but still face unanswered questions, such as where to start, what data to consider, or how the analysis will impact business processes and outcomes.

Organizations that choose to deploy cloud and on-premises platforms and software are often ahead in the data-driven enterprise culture than others that are still testing different service approaches. At the same time, many are often not focused on data strategy and consulting, which can be better addressed by technology independent service providers rather than focused technology, cloud and IT service providers. Service providers that have a strong consulting department or offer consulting for follow-up projects are also a part of this study.

As mentioned earlier, the pandemic has not only accelerated the pace of change in analytics but has also given companies and service providers the opportunity to prioritize investments and innovations to support this process.

Analytics used to play a role primarily in banks, insurance companies and financial service providers, and large corporations with complex issues around what-if analysis and risk analysis. New industries are now investing in analytics. Companies in the healthcare and life sciences, retail, consumer packaged goods and manufacturing industries have increased their investments in analytics solutions and services. Several service providers reported an increase in projects in these sectors, especially for data science and data engineering services. While there were some major projects such as pandemic genome sequencing, most of the projects were related to supply chain or distribution, commodity forecasting, commodity pricing, predictive maintenance, maximizing production yields, sales recommendation engine, segmentation engine and a few others. These investments help improve both revenue and the bottom line, making these companies more efficient through data-driven insights.

Long-time analytics users leverage large data warehouses for their tasks often in parallel. In the course of cloudification of their IT landscape, these users want to use the services of IT service providers for the operation of analytical applications. Users that have only been exposed to analytics in recent years are looking for practical and functional solutions that do not require them to manage their own data warehouses.

At the same time, providers should focus on staff management and employee motivation. The Young Professional Attractiveness Index 2021 (YPAI), in cooperation with the market research institute Kantar, has listed down the most popular employers in Germany. Of

the top 10, only Google, SAP and Microsoft are represented in this study. This shows that most providers should take various initiatives such as providing clearly defined career paths, in-house training, salary levels, fringe benefits and others. However, international providers with a strong presence in Germany face a major challenge in these aspects unlike smaller local suppliers that are often further ahead. Smaller players often have long-term employees who can identify with the company culture and apply their strong industry knowledge to projects. Such companies focus on employee empowerment by eliminating micromanagement and micro-reporting and providing many benefits along with a pleasant work environment.

The top vendors in the data lifecycle management services market are Accenture, Alexander Thamm, Atos, Capgemini, Deloitte, DXC, IBM, Infomotion, Infosys, NTT DATA and PwC. Wipro was positioned as a Rising Star.

The leading data science service providers are *um (Orange Business Services), Accenture, Alexander Thamm, Capgemini, Cognizant, Deloitte, DXC, IBM, Infosys, STATWORX and Tech Mahindra. Blue Yonder is a Rising Star.

The following companies have been positioned as market leaders for data engineering services: *um (Orange Business Services), Accenture, Alexander Thamm, Atos, Capgemini, Cognizant, Deloitte, DXC, GFT, IBM, Infosys, PwC and STATWORX. Data Insights is a Rising Star.



Introduction

Simplified illustration



Source: ISG 2021

Definition

The emergence of new technologies such as cloud computing, IoT, data science, machine learning and deep learning has created opportunities for a significant number of applications and improvements in business performance. Analytics is one of the key factors that helps organizations stay ahead of their competitors.

Over the past decade, with the exponential increase in data generated and the technologies associated with it, there has been a high demand for specialized data experts particularly data scientists, data engineers and data analysts.

Definition (cont.)

Service providers are aggressively acquiring startups and established analytics vendors with niche capabilities to expand their portfolios as analytics has become a business priority. End users expect analytics to be integrated into all solutions and services. In a marketplace where products and services are increasingly becoming a commodity, service providers are making careful investments to gain a competitive advantage, because analytical expertise can make a difference in client wins.

ISG has observed that many new players are entering the analytics market, either in the solutions or services space, leading to intense competition. Snowflake, a cloud data storage provider, is one such example – in 2020, it was the largest software company to go public in the last decade. Large technology companies have integrated big data and

analytics into their core offerings. Analytics is expected to play an even bigger role in the market for technology providers.

In this third annual edition, the scope of the ISG Provider Lens™ Analytics Services 2021 report has been expanded. Data science services include actors that provide the bulk of analytical skills. Data engineering services include providers that develop the technical aspects of implementing data structures so that companies can benefit from their data not only securely but also in real time. Data lifecycle management services are offered by vendors that develop processes, practices and technologies to help organizations transform into data-driven entities.

Definition (cont.)

Scope of the report

This ISG Provider Lens™ study provides IT and business decision makers with the following benefits:

- A transparent presentation of the strengths and weaknesses of the respective providers
- Differentiated positioning of suppliers according to segments
- View of various markets: Germany, Brazil, and the U.S.

The study thus provides an essential decision-making basis for positioning, relationship and go-to-market considerations. ISG consultants and corporate clients also use the information in these reports to evaluate their current and potential relationships with suppliers.



Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT 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 IT 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 US\$20 million and US\$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with 5,000 or more employees or revenue above US\$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

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.

Leader

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.

Product Challenger

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.

Market Challenger

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.

Contender

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 both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

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).

Rising Star

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

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.

Analytics Services - Quadrant Provider Listing 1 of 3

| | Data Science Services | Data Engineering Services | Data Lifecycle Management Services |
|-----------------|-----------------------|---------------------------|------------------------------------|
| Accenture | ● Leader | ● Leader | ● Leader |
| Alexander Thamm | ● Leader | ● Leader | ● Leader |
| Atos | ● Leader | ● Leader | ● Leader |
| Blue Yonder | ● Rising Star | ● Product Challenger | ● Not in |
| Birlasoft | ● Product Challenger | ● Contender | ● Product Challenger |
| b.telligent | ● Not in | ● Not in | ● Contender |
| Capgemini | ● Leader | ● Leader | ● Leader |
| Cognizant | ● Leader | ● Leader | ● Not in |
| Data Insights | ● Not in | ● Rising Star | ● Not in |
| Deloitte | ● Not in | ● Leader | ● Leader |
| Double Slash | ● Product Challenger | ● Not in | ● Not in |
| DXC | ● Leader | ● Leader | ● Leader |
| eoda | ● Product Challenger | ● Product Challenger | ● Not in |

Analytics Services - Quadrant Provider Listing 2 of 3

| | | Data Science Services | Data Engineering Services | Data Lifecycle Management Services |
|----------------|---|-----------------------|---------------------------|------------------------------------|
| EY | ● | Contender | ● | Market Challenger |
| GFT | ● | Not in | ● | Leader |
| HCL | ● | Not in | ● | Contender |
| Hexaware | ● | Market Challenger | ● | Not in |
| IBM | ● | Leader | ● | Leader |
| Infomotion | ● | Not in | ● | Not in |
| Infomotion | ● | Not in | ● | Leader |
| Innominds | ● | Contender | ● | Contender |
| Innominds | ● | Contender | ● | Not in |
| Infosys | ● | Leader | ● | Leader |
| Infosys | ● | Leader | ● | Market Challenger |
| KPMG | ● | Market Challenger | ● | Market Challenger |
| KPMG | ● | Market Challenger | ● | Market Challenger |
| Marmeladenbaum | ● | Not in | ● | Not in |
| Marmeladenbaum | ● | Not in | ● | Product Challenger |
| Mindtree | ● | Not in | ● | Not in |
| Mindtree | ● | Not in | ● | Contender |
| Mphasis | ● | Not in | ● | Not in |
| Mphasis | ● | Not in | ● | Contender |
| mVise | ● | Contender | ● | Contender |
| mVise | ● | Contender | ● | Not in |

Analytics Services - Quadrant Provider Listing 3 of 3

| | Data Science Services | Data Engineering Services | Data Lifecycle Management Services |
|--------------------------------|-----------------------|---------------------------|------------------------------------|
| N-iX | ● Product Challenger | ● Product Challenger | ● Not in |
| NTT Data | ● Not in | ● Not in | ● Leader |
| Opitz | ● Not in | ● Not in | ● Contender |
| *um (Orange Business Services) | ● Leader | ● Leader | ● Not in |
| PWC | ● Market Challenger | ● Leader | ● Leader |
| reply | ● Not in | ● Not in | ● Product Challenger |
| STATWORX | ● Leader | ● Leader | ● Not in |
| Sopra Steria | ● Not in | ● Not in | ● Market Challenger |
| Tech Mahindra | ● Leader | ● Not in | ● Contender |
| TCS | ● Product Challenger | ● Product Challenger | ● Product Challenger |
| Wipro | ● Product Challenger | ● Contender | ● Rising Star |



Analytics Services Quadrants

ENTERPRISE CONTEXT

Data Engineering Services

In this quadrant, ISG evaluates the changing dynamics of data engineering services that involve collecting and aggregating data from structured, semi-structured and unstructured sources. ISG defies the current positioning of providers of data engineering services in Germany, along with their relative strengths.

Data engineering is gaining prominence as an increasing number of enterprises are realizing its importance and are capturing data from different sources, including edge devices. Globally, the demand for data engineering is driven by industries that were hit hard by the pandemic. The immediate strategic response of these enterprises has been to move their workloads to cloud and hybrid cloud environments. Consequently, multi-cloud adoption and new data modernization techniques in cloud, including DataOps and MLOps, are gaining popularity among enterprises; they enable self-service and low-code platforms of data processing engines.

Who can use this report to identify and evaluate different service providers:

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

Innovation leaders should read this report to understand a provider's capability to deliver seamless solutions, leveraging blockchain, AI and analytics. The report will also give insight on how the providers can be compared with one another.

Business strategy leaders, through this report, will gain knowledge on providers' product portfolio capabilities, which, in turn, will enable streamlined workflow for enterprises and enhanced functionality for agents.

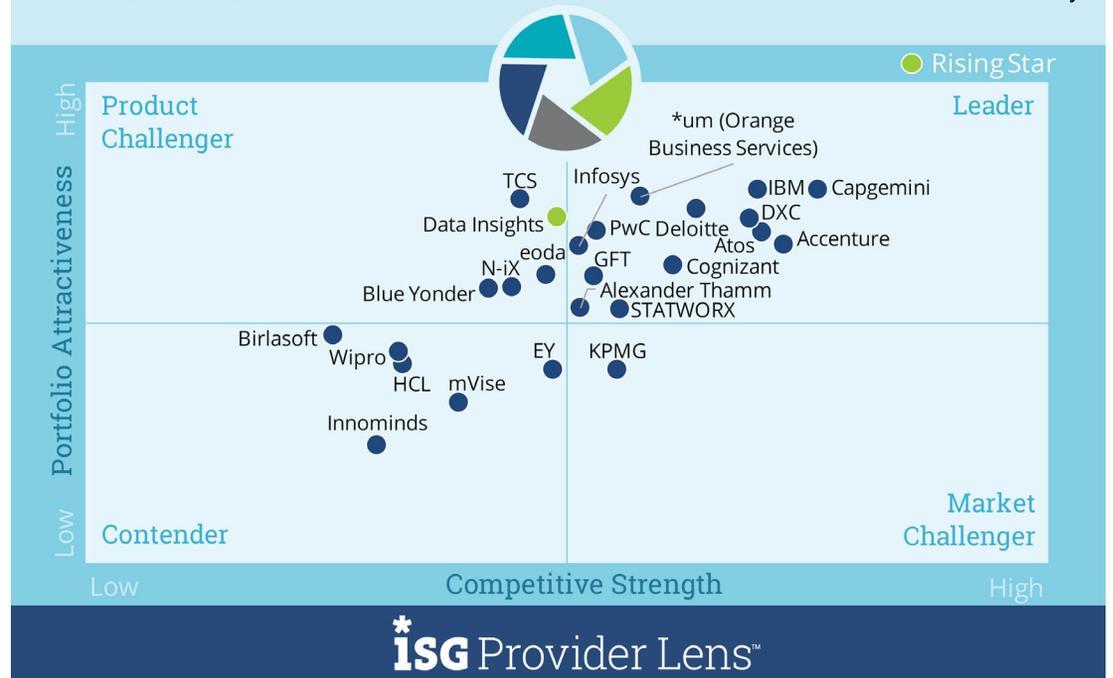
DATA ENGINEERING SERVICES

Definition

The consulting, systems integration, and managed services providers evaluated in this quadrant offer services such as collecting and aggregating data from structured, semi-structured and unstructured sources. These services include email messages, word processing documents, audio or video files, collaboration software and instant messages among others. The data is obtained from various systems, processed in context, and made available to users in structured form depending on the access configuration. The offerings include developing data pipelines and data models, managing file format conversions, performing data transformations, cleansing, and extraction, transformation and loading (ETL) operations.

Analytics - Services
Data Engineering Services

2021
Germany



Source: ISG Research 2021

DATA ENGINEERING SERVICES

Eligibility Criteria

- Demonstrate technology knowledge and experience in architectural consulting
- Exhibit approaches, methods used and depth of the service portfolio
- Offer skills and an adequate count of data science experts in the relevant regional markets
- Offer independent advice and selection of solution providers
- Provide standardized and customized frameworks and platforms for data aggregation and cleansing.

Observations

The data engineering space is no longer limited to ETL functions or building data lakes. The preparation of data from a wide variety of sources and in various formats (sometimes in undefined states) should be verified and is an important data engineering task. Technical innovations for building intelligent analytic environments include DataOps, MLOps and DevOps. Providers should be able to implement IT environments for data storage on-premises or as multi-cloud environments and cross-enterprise data structures.

For analytic applications, users are becoming familiar with terms such as data monetization, data democratization and data orchestration. Data engineering services apply these concepts. Employees can significantly improve the value of the analysis by leveraging on-site knowledge. Typically, field employees have a better understanding of detailed data to develop solutions. Such attributes help enterprises stay ahead of the competition. Service providers should offer such support with features that are no longer just meant to populate dashboards.

DATA ENGINEERING SERVICES

Observations (cont.)

- ***um (Orange Business Services)** caters to clients of all sizes and provides access to complementary services from the parent company, helping it to consolidate its leadership.
- **Accenture** offers expertise in data lakes, cloud services (including with partners) and consulting, making it one of the leading providers.
- **Alexander Thamm** has moved up from the Product Challenger group to the Leader group.
- **Atos** aims to understand its target group and needs. Its IT services cover automation, including data preparation, data science, analytics and data orchestration (also in the cloud).
- **Capgemini** is highly successful with projects, supports clients with industry specific knowledge, and is valued in the target group for its implementation strength.
- **Cognizant** was able to maintain its leadership position with slight changes due to refinements in the quadrant criteria.
- **Deloitte** has consolidated its position with numerous qualified consultants and technical expertise.
- **DXC** maintains its position in this year's evaluation as a proven service provider
- **GFT** was evaluated in this study for the first time and quickly reached a place among other leading providers.
- **IBM** has a service portfolio that covers almost all tasks, making it well positioned to sustain its leadership.
- **Infosys** has been elevated from a product contender to a market leader in this market segment. This is attributed to a combination of expertise in data engineering services, knowledge of the needs of the target audience, and technically advanced cloud services.
- **PwC** has been defending its position in the group of leaders successfully.
- **STATWORX** helps users improve their knowledge and works closely with clients in enhancing their data literacy. With its comprehensive product portfolio, the company has evolved from a challenger to a market leader.
- **Data Insights** is one of the most advanced providers of computer vision and AI methods. It was named a Rising Star in this quadrant.

*UM (ORANGE BUSINESS SERVICES)

Overview

*um, an Orange Business Services company, provides big data, data science and cloud services. It was founded in 2008 and has around 180 employees. *um has offices in Berlin, Frankfurt and Vienna. It develops tailor-made solutions to address the specific business challenges of well-known clients.

Strengths

Specialist for growth courses: The company was able to increase its sales by 15 percent during the year of the pandemic. The references and large number of vacancies indicate a strong growth course.

Parent company with international activities: Since 2018, *um has been part of Orange Business Services and can thus draw on the resources of an international IT service provider for projects. This has enabled it to expand the range of its competence centers.

Strong reference cases: In the first year of the pandemic, *um quickly built a Power BI-based reporting solution for a global company based in Germany. It provided access to a data warehouse through an ELT pipeline and helped migrate data from multiple databases. It also met the high safety requirements of the client.

Caution

Given its focus on serving large suppliers, *um should continue to maintain visibility in the market. However, this has become difficult due to the pandemic, impacting its inability to fully leverage the parent company's marketing skills and competencies.



2021 ISG Provider Lens™ Leader

*um is among the leading providers for German clients that want to implement data engineering projects.



Methodology

METHODOLOGY

The study "ISG Provider Lens™ Analytics Services" analyzes the relevant software vendors and service providers in the German market on the basis of a multi-stage market research and analysis process and positions them according to the methodology of ISG Research.

The study was divided into the following steps:

1. Market definition for Analytics Services
2. Survey among service providers and suppliers on all current topics
3. Interactive discussions with service providers and vendors about their services and use cases
4. Use of ISG's internal databases and the knowledge and experience of ISG's consultants (where possible)
5. Detailed analysis and evaluation of services and corresponding documentation based on data and figures provided by the providers and other sources.
6. Evaluation on the basis of the following 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



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