

Analytics Services

Data Science Services

A Market research report that compares the strengths, challenges and unique characteristics of service providers

Customized report courtesy of:



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Report Author: Holm Landrock

Data is the oil of the 21st century - this vision is taking shape

The uncertainties induced by the Corona pandemic have made many companies realize the need for predictions based on concrete business data with real monetary value. Although many companies invested heavily in new solutions during 2020-21, additional IT investments were postponed due to uncertainties and rising energy costs in Germany.

In the past 12 months, the service providers surveyed here have helped their customers implement new analytics solutions and transform existing data warehouse/BI environments into advanced analytics applications.

The criteria for this study have been revised this year to exclude services that played a role in the last two years, such as offerings specific to COVID-19 risks and impact analysis. New criteria for the assessment include the ability of providers to address the shortage of qualified personnel through approaches such as partnerships with universities and/or companies in the peer group or in the supply chain. The research on this study revealed that local and a few international providers are more engaged in coping with the talent war than large international providers that deliver services primarily offshore or nearshore. Clients averted disruptions in the market using these solutions.

The projects initiated relating to the COVID-19 pandemic have been implemented and are in production. However, the willingness to invest has seen a decline owing to the economic

Data has never
been **more**
valuable than
today.



Executive Summary

and energy crises in Europe, especially in Germany. This is noticeable in the market for advanced analytical services and solutions. Due to the reluctance of users to invest in IT, the companies evaluated must be considered particularly successful.

In the past, many clients have failed to invest sufficiently in their own digitization and in the digitization of their business models and have not pushed their transformations forward. Today, there is a lack of data needed to optimize the company's key figures. Therefore, many projects are focusing on extracting data treasures from legacy systems.

Until now, many vendors could rely on customer requests, but the tide has turned. As customer demands decline, service providers are faced with the need to actively approach customers and promote projects and their value. In addition to large accounts, high-end

SMEs with 500 to 2,000 employees, in particular, must be addressed in a specific and individual way. Historically, services for analytics generated constant cashflows for IT providers. But with early adopters already catered to and with the ability to run these services themselves, these services have lost their initial demand.

Providers could ensure that word of mouth becomes a lead-generation tool through user associations. From this point of view, the marketing communication pendulum is swinging back to the classic, individual and tailor-made approach to customers with press relations, references, events and trade fairs and, of course, an attractive service portfolio.

Packaging and product maximization are generally good ideas to serve customers with custom-made solutions. Industrialized solutions and approaches are gaining traction worldwide. Service providers are increasingly offering

analytical tools and gas pedals based on their extensive industry experience and areas of business expertise.

There is also a growing need to approach customers based on their specific needs. Outcome-based services often are on the top of clients' wish lists, whereby services are provided initially "for free," and payment models are based on the client's economic success.

Reference clients and success stories that fit the individual target groups of a provider are also essential.

The *one-size-fits-all* concept has always been difficult to apply to analytical services and could be difficult to market in the future.

Considering regional specifics is also extremely important. However, a strong regional organization requires a regional breakdown in service offerings. Particularly

in the area of data engineering, providers need to respect the different data characteristics. While in, for example, the U.S. and India, financial data are more common for analytics, in Germany, there's a huge amount of data from engineering or technical-scientific projects which is the target of analytics solutions.

Data literacy — the fundamental understanding of data and its value — is becoming the most important foundation and skill for employees in the context of digital transformation and, thus, in client projects of providers that have been considered in this study. The prerequisite for digitalized business and business architectures is competent management of the data generated by an organization to create value from data and new data-based business models. Just a few providers have designed independent service offerings to cope with that challenge.



Executive Summary

Until now, providers have been offering services for better data literacy but not as complimentary services with larger projects.

ISG advises provider companies to invest in fostering client enterprises' data-driven culture that spans employees of all lines of business to expand their perspective on data. Analytics services should use data as a lever to improve business results. Clients are driving a mindset shift both at employee and C-level to drive business success based on data-driven intelligence.

Depending on their level of digital maturity, many user companies are becoming customer- and business-centric to increase revenue from analytics. Few large companies and some small niche companies are already adopting fully data-centric or data-driven approaches.

Customer experience (CX) and customer engagement (CE) are areas that implement analytics solutions as

well as solve the primary challenge in many industries. Hyper-personalization and hyper-targeting of customers are becoming important aspects for user companies when it comes to acquiring new customers and avoiding customer loss. Customer analytics solutions and services are evolving into commodity solutions, as they are already offered in part by large and specialized service providers. Service providers are also actively offering analytics solutions that cover areas such as customer value, CX, customer journey and customer retention to better support companies' customer strategies. They collect, analyze and evaluate data from sources such as omnichannel AI, IoT and edge, AI-based dialogue systems, chatbots and other social media APIs to gain insights.

These touchpoints are increasingly equipped with simple, contextual AI features to improve CX.

In technical and manufacturing companies, analytics services play an important role, especially in improving and optimizing development, production and sales processes. As a result, service providers are increasingly offering readily available and customized versions of their services, solutions and platforms that are tailored to specific customer needs. Data monetization and data ecosystems are playing an increasingly important role.

The market is on the cusp of a realization that data and analytics are important not only for the rapid success of companies but also for their survival. This ISG analysis shows that companies are increasingly and strategically directing their investments in analytics.

Local providers are often more engaged than international providers.



Provider Positioning

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	Data Engineering Services	Data Science Services	Data Monetization Services
Accenture	Leader	Leader	Leader
Alexander Thamm	Product Challenger	Leader	Not In
Atos	Leader	Leader	Not In
b.telligent	Leader	Rising Star ★	Market Challenger
Birlasoft	Contender	Product Challenger	Not In
Capgemini	Leader	Leader	Leader
Cognizant	Leader	Leader	Product Challenger
Data Insights	Product Challenger	Not In	Not In
Deloitte	Leader	Contender	Not In



 Provider Positioning

	Data Engineering Services	Data Science Services	Data Monetization Services
Double Slash	Not In	Product Challenger	Not In
DXC Technology	Leader	Leader	Not In
eoda	Not In	Product Challenger	Not In
EY	Contender	Contender	Not In
GFT	Leader	Not In	Not In
HCLTech	Not In	Not In	Contender
IBM	Leader	Leader	Leader
Infosys	Leader	Leader	Product Challenger
IT-Novum	Market Challenger	Not In	Not In



Provider Positioning

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	Data Engineering Services	Data Science Services	Data Monetization Services
KPMG	Market Challenger	Market Challenger	Not In
Marmeladenbaum	Not In	Product Challenger	Not In
LTIMindtree	Contender	Not In	Contender
mVISE	Contender	Product Challenger	Not In
N-iX	Not In	Contender	Not In
OPITZ	Market Challenger	Not In	Not In
Orange Business Services	Leader	Leader	Not In
Persistent Systems	Not In	Not In	Contender
pmOne	Contender	Contender	Not In



Provider Positioning

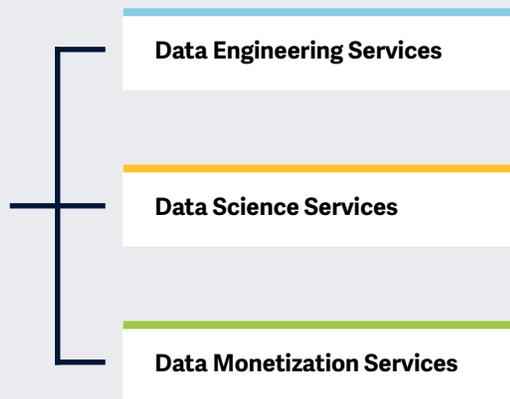
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	Data Engineering Services	Data Science Services	Data Monetization Services
PwC	Leader	Leader	Not In
reply	Rising Star ★	Product Challenger	Product Challenger
STATWORX	Leader	Leader	Not In
Stefanini	Not In	Contender	Contender
TCS	Product Challenger	Market Challenger	Product Challenger
Tech Mahindra	Not In	Contender	Contender
Wipro	Market Challenger	Not In	Not In



This study focuses on what ISG sees as most important for **analytics** in 2022.

Simplified Illustration Source: ISG 2022



Definition

Analytics is growing in importance, as evident from the significant investments by enterprises on these solutions on their journey toward becoming data-centric entities. Data analytics is becoming integral to the business approaches and digital transformation initiatives of enterprises. ISG analysis indicates a fundamental shift in the mindsets of large enterprises and small and mid-sized businesses (SMBs) — analytics is no longer about basic business data; analytics solutions are now deployed to derive business value from data. Enterprises wish to address specific business areas such as decision-making, revenue streams, customer experience, operational excellence and optimized business processes. ISG analysis also indicates that while enterprises differ in

the level of maturity with their data and analytics practices, they are unanimous in the shift to adopting data-driven processes and embracing a data-centric culture. Compared with 2021, data science services have been witnessing significant changes — veering away from statistical modeling and toward business value and decision intelligence. Providers and enterprises expect data scientists to better understand business context and objectives to enhance insights and thereby enable actionable decision making. While technical skills continue to be a prerequisite to a data scientist's role, business knowledge with domain expertise is increasingly being sought to improve business outcomes. Data engineering services continue to dominate this space with the largest share of revenue and deals, but with a shift from data integration to data



Introduction

fabrics, and adaptive and smart data pipelines. As the focus moves away from simple integration related deals, the productized data engineering market is witnessing an increasing number of service-oriented deals and projects. Data monetization services is a new market segment analyzed in the 2022 edition of this study. It was added because enterprises increasingly require data hubs, data ecosystems and solutions to share data. Data has become key to obtaining multidimensional perspectives across business segments, partners, supply chains, customers and co-innovators.



Scope of the Report

In this ISG Provider Lens™-Quadrant study, ISG analyzes service provider offerings based on the three quadrants Data Engineering Services, Data Science Services and Data Monetization Services.

The ISG Provider Lens™ study offers IT decision makers the following advantages:

- Transparent presentation of the strengths and weaknesses of relevant providers
- A differentiated supplier positioning based on segments
- A focus on the regional market

The study thus provides an essential decision basis for positioning, relationship and go-to-market considerations.

ISG Advisors and corporate customers also use information from these reports to evaluate their current and potential new supplier relationships.

Provider Classifications

The positioning of the suppliers reflects the suitability of the IT service providers for a defined market segment (quadrant). Unless otherwise noted, the positioning applies to all company size classes and industries.

If the IT service requirements of large companies and SMEs differ and the range of IT providers active in the local market is sufficiently broad, a further differentiation of IT providers by service is made according to the target group for products and services. Either industry requirements or the number of employees as well as the corporate structures of the customers are taken into account and the IT providers are placed based on their focus.

As a result, a distinction is made between two customer groups, which are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues of \$20 million to \$999 million, headquartered in the country concerned and generally privately held.
- **Large Accounts:** These are multinational companies with 5,000 or more employees or revenues of more than \$1 billion, operating worldwide and with decision-making structures spread across the globe.

The ISG Provider Lens™ quadrants are based on an evaluation matrix and include four fields in which providers are ranked: Leader, Product & Market Challenger and Contender. Each quadrant of an ISG Provider Lens™ study may also include a provider that ISG believes

has great potential to achieve a leader position. Such providers may be classified as Rising Star.

Number of providers per quadrant:

ISG evaluates and places key providers according to the scope of consideration for each study; the number of providers per quadrant is limited to 25, but exceptions may apply.



 **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

Who Should Read This

This report is relevant to enterprises across multiple industries in Germany for evaluating providers that offer data science services. In this quadrant report, ISG highlights the current market positioning of providers that offer data science services based on the depth of their offering and market presence in the region.

The pandemic has cast a long shadow over businesses, pushing the limits of digitalization even further with newer business models. It led to an increase in data generating points or data sources, resulting in considerable discrepancy across data formats, both structured and unstructured. With the vast volumes of data generated, enterprises found it to derive actionable insights and make right business decisions and were increasingly relying on data science services providers for business support.

To address these challenges, enterprises are seeking data science service providers that not only offer services but will also be a part of their entire transformation journey. These providers are expected to provide support throughout the process covering consultation and trainings, even extended to decision making. They have proven capabilities in new technologies such as IoT, edge analytics, AI/ML and digital twins. They are expected to have professionals/experts with strong industry knowledge to suggest and implement reliable and relevant solutions and services.



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.

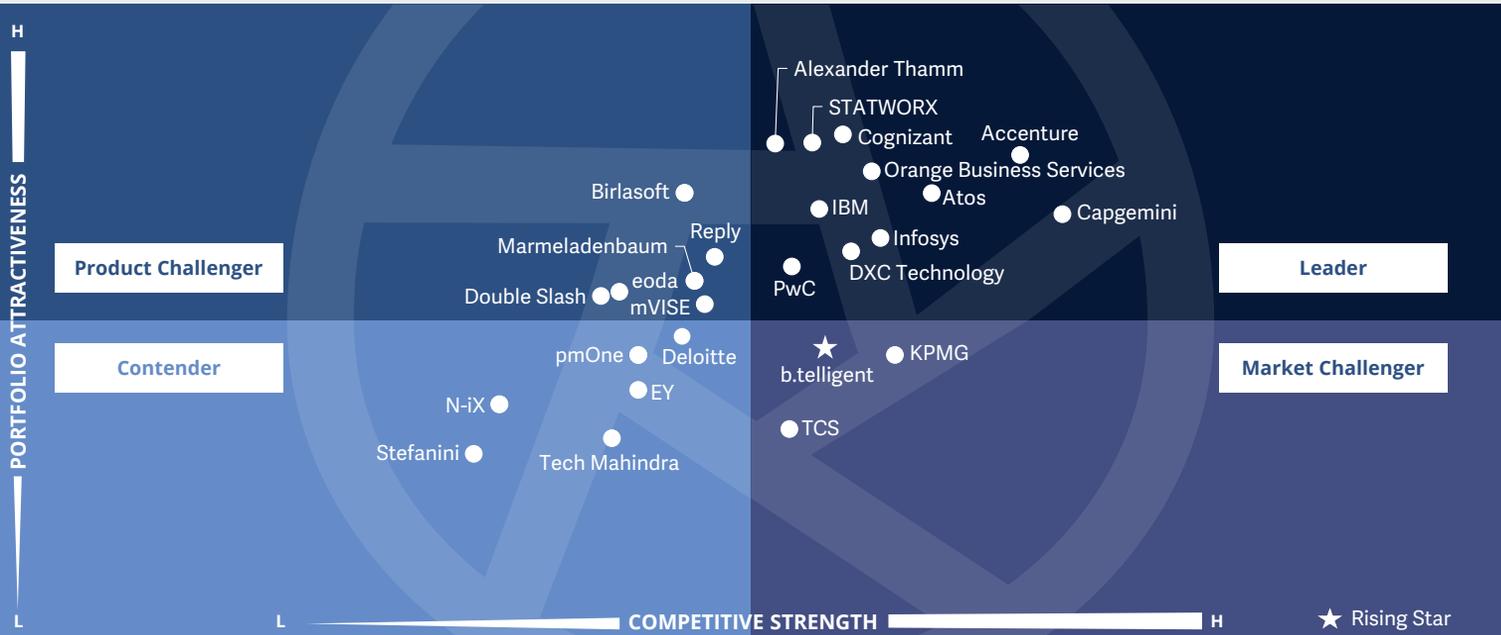


Innovation leaders should read this report to understand a provider's capability to deliver seamless solutions through blockchain, AI and analytics capabilities. The report also gives insights into how providers can be compared with one another.



Chief Data Officers (CDOs), responsible for creating value from data assets and data ecosystem, should read this report to gain a better perspective on effective analytics tools and techniques that can boost business outcomes through analytics and produce more value from their enterprise data.





Data science services support users in the **exploration, exploitation and extraction of data treasures** in the most diverse data warehouses. Providers have detailed knowledge of their customers' data structures and can identify important data.

Holm Landrock



Definition

In this quadrant, the portfolios of vendors that offer data science-based consulting and systems integration services are evaluated. Vendors that qualify for this quadrant offer services to integrate scientific methods into their clients' business context. By combining their knowledge and industry expertise, they solve critical business challenges and thereby enable their clients to achieve substantial, data-driven business growth through applicable insights. The insights gained from data science can even lead to new business models and revenue streams. The goal is to define and use contextual questions to extract relevant information from a multitude of data streams; data science works with both structured and unstructured data.

The service providers evaluated in this study are expected to serve business needs, including providing advice, identifying business applications, and developing statistical models and algorithms. They are able to model and adapt ML algorithms and workflows with best-of-breed solutions so that their services can be used efficiently. These vendors also offer support and training services that can be purchased as independent offerings from other service contracts.

Eligibility Criteria

1. Expertise in **strategy, vision and consulting**
2. **Structured methodology** and service portfolio with proprietary offerings including, but not limited to, **industrialized playbooks, structured frameworks, AI and ML platforms, gas pedals, advanced automation features**, and workbenches
3. Demonstrated proficiency with a number of data science experts in the relevant regions who provide specific services onsite, as they have a **deep understanding of the local market dynamics, culture and regulatory requirements**, as well as the language - a prerequisite for services to be provided within this market category
4. **Technology expertise and business knowledge** of clients' regional and industry needs, statistical and mathematical modeling skills, and vendor-neutral advice and options
5. **Centers of expertise and data models readily available** for sector-specific and functional business context
6. Experience exemplified by solutions offered **for federated learning, data competency, advanced analytics (computer vision, audio, Natural Language Processing [NLP], Natural Language Generation [NLG], and Graph DB)**, support and training services that can be purchased as stand-alone offerings, independent of other service contracts



Observations

What does a market look like that has been steadily consolidating since the early years of the Big Data hype? The study finds the market in a placid state, with minimal movement, and new entrants are yet to qualify. There is just minimal movement, and new entrants are yet to qualify for the study. Companies with a technical approach have the potential to attract new customers.

Regional adaptation of services is especially important in data science, as clients in different countries often have different historical data and corporate cultures. The data generated today also has different characteristics in different regions. While in the U.S. or India, it is more financial (BFSI, i.e., banking, financial services and insurance) or commercial data, in Germany, the data generated is mainly from engineering or technical-scientific companies.

Sustainability - the circular economy – plays an increasingly important role in not only meeting the current challenges in national economies but also making companies operate more profitably.

Self-service solutions are becoming the new normal. An increasing number of providers are supporting users in this regard, right down to the transfer of knowledge. Data literacy is an important skill in digitalization. Without the competent use of the data generated in a digitized IT and business architecture, creating added value and new business models will be impossible.

While most providers rely heavily on the cloud platforms offered by hyperscalers, a few providers differentiate themselves by offering their own platforms and working with dedicated partners for data warehouses, business intelligence (BI) platforms and data lakes. These providers are often ahead of the

competition, meeting the customers on the same page and performing brownfield implementations more efficiently.

Of the 26 companies evaluated for this market segment, 11 qualified as Leaders. b.telligent was voted as a Rising Star.

accenture

Accenture recently acquired the data science specialist ALBERT Inc. and strengthened its team of data scientists. With a comprehensive data science and AI offering, Accenture helps clients become data-driven businesses through its data science services.

Alexander Thamm

Alexander Thamm, or **[at]**, is one of the leading providers of data science and technical services for large companies in Germany. With its services, [at] caters to clients such as major automobile manufacturers. During the period of this study, [at] grew strongly and was able to maintain its position among Leaders.

Atos

Atos failed to acquire DXC Technology; at the same time, the company was redistributed. Apart from the crises in Europe, Atos faced other significant challenges last year. However, Atos was able to defend its leading position, and the reorientation is expected to succeed.



Data Science Services



Capgemini recently acquired Braincourt, among other companies, bringing the skills of a specialist in BI and data science services to the company. In Germany, Capgemini is one of the leading service providers for data science, which is reflected in its top position in this study.



With its Learning Evolutionary Algorithm Framework (**LEAF**) and other solutions, **Cognizant** has consistently invested in trends such as enterprise intelligence and customer experience. The provider has a comprehensive portfolio that can draw on skilled employees as well as its own platforms and solutions.



DXC Technology has strengths in application design, even visionary ones, as well as consulting know-how, which it combines with a qualified team and application frameworks. Turnkey platforms make it easier for users to make unprecedented AI and data-driven business decisions.



IBM's technology and know-how are the foundation of the provider's leadership role in data science. IBM is investing in a wide range of AI and analytics solutions to increase the intelligence of data-driven decisions and analyze business performance indicators more quickly. Technical-scientific applications, such as in R&D, are also driven by IBM's data science solutions.



Infosys has a broad portfolio complemented by investments in its own platforms and gas pedals. Infosys leverages its industry and domain experience to develop a wide range of tools, frameworks and solutions to solve complex problems.



Orange Business Services (Orange) is one of the leading providers of data science services in Germany. The provider focuses on customer involvement and the ability to work with data within the company itself. The portfolio includes the complete services of an IT service provider.



PwC offers clients a robust portfolio of services to help identify business information and analyze it for decision support. In addition to data science services focusing on key performance indicators, PwC has industry know-how and AI functions with a high degree of specialization.



statworx is a regional provider whose strengths lie in the detailed knowledge of the user landscape, the regional footprint and the development of specific solutions for users' data science tasks. statworx's corroborated its expertise during the observation period of this study with attractive references.





Data Science Services

b.telligent

b.telligent has been positioned as a Rising Star in this evaluation. The company has experienced strong growth in recent years, and its partner ecosystem is also growing. b.telligent has a good chance to be part of the Leader quadrant in the coming years.





"Data sciences with IT infrastructure services are Orange Business Services' forte."

Holm Landrock

Orange Business Services

Overview

Orange Business Services is based in Paris and operates in 55 countries. It has 28,500 employees in about 100 subsidiaries and generated a revenue of \$9.5 billion in FY20, with IT services accounting for the major share. In Germany, the company's data engineering service offerings include mainly the ideas and solutions of the now fully integrated The unbelievable Machine Company.

Strengths

Focus on priority areas: Orange Business Services uses its portfolio of data science services to respond faster and more effectively to pressing customer needs, such as cloud-based IT infrastructure, cyber defense and digital strategies.

Industry and manufacturing use cases: Orange Business Services data science services help users optimize manufacturing and business processes. For example, data science services are used in the industry to merge sensor data with process data to transform rigid maintenance models into more flexible ones.

Cloud and infrastructure services:

With the cloud platform, managed services and infrastructure services around private cloud, Orange Business Services also provides an operating platform in addition to strategies, concepts, services and solutions.

Caution

Orange Business Services' data science capabilities must be clearly highlighted in the overall portfolio.

Data thinking is a distinguishing feature of the company but needs to be brought to the market along with complementary services and training offerings.





Appendix

The ISG Provider Lens™ 2022 - Analytics Services market research report analyzes the corresponding service providers in the German market based on a multi-level market research and analysis process and positions these providers based on ISG Research methodology. Information Services Group assumes sole responsibility for this report.

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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 October 2022, 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 Service Providers 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



Distinguished Lead Analyst

Holm Landrock
Senior Advisor

As an ICT analyst, technical journalist and author of several books, Holm Landrock's core topics include technical-scientific computing, enterprise computing and trending topics such as e-health and quantum computing.

At ISG Holm Landrock has built the multi-client studies and vendor benchmarks, now IPL studies, and has supported renowned clients – Including

internationally leading mobility and financial services providers – with the strategic selection of modern solutions in order to support the client's digital transformation. He supports both user clients and ICT providers.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

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 research director, principal analyst 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™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

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

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DECEMBER, 2022

REPORT: ANALYTICS SERVICES