

Advanced Analytics and AI Services

A research report comparing provider strengths, challenges and competitive differentiators to assist decision-makers in advanced analytics and AI services

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Applied AI investments are oriented toward building intelligent, autonomous and generative enterprises.

The European business environment is undergoing a fundamental shift in market dynamics amid industry-specific challenges, supply chain disruptions, macroeconomic uncertainties and stringent sustainability practices. This necessitates enterprises to utilize deep forecasting and economic modeling techniques to proactively forecast, assess and mitigate risks. ISG's analysis indicates that enterprises operating in Europe continue to face headwinds similar to those of their counterparts in other parts of the globe. However, the regional data and AI regulations and acts clearly distinguish their approach to using and securing data responsibly and promoting a green economy.

The prominence and reliance on data in decision-making have substantially increased, augmenting the power of cognitive AI and

cloud computing. Enterprises are progressively adopting an AI-first approach centered around principles of data as a strategic asset that reimagines their operations, strategy, innovation and CX. It also provides new avenues of growth through the monetization of data through marketplaces. This paradigm shift also embraces the democratization of data to make it accessible across departments within the enterprise, facilitating business users to leverage data and insights for informed decision-making. Enterprises have spurred their need to navigate complexities in customer expectations, operational agility and market competitiveness. This drives enterprises toward data operationalization across workflows utilizing the blend of big data, advanced analytics and AI.

There is a focus on human-AI collaboration as enterprises recognize the potential of augmenting human intelligence with applied AI to automate several repetitive processes, identify patterns, uncover trends and generate actionable insights.

Prudently governed
modern data
ecosystems
drive AI
development,
revolutionizing
smart decision-
making.



ISG has identified some of the key challenges enterprises face with analytics and AI initiatives, including:

Need for unified data strategy: Enterprises in Europe face significant challenges due to the lack of a comprehensive and unified data strategy. This leads to operational hurdles in ensuring data quality, consistency and accessibility across business functions and departments. Consequently, there is a need for a cohesive framework to combine and manage data sources, systems, processes and governance to foster a culture of data centricity, which is essential for driving data-driven initiatives that align with business objectives and enhance overall operational efficiency.

Complexities in data and model lifecycle management: Enterprises in Europe often struggle to monitor and manage data flow through the different stages of the lifecycle, leading to underutilization of datasets. This lack of visibility leads to data redundancies, outdated information and unclear understanding of data lineage, further complicating quality and compliance processes. As each stage of the data lifecycle

presents unique security risks, effective oversight and management of data throughout its lifecycle is critical to mitigate risks and protect data. ML models require continuous monitoring to ensure they perform as expected in real-world scenarios without model drifts and degradations due to changes in data patterns. This necessitates regular evaluation, retraining and rigorous version control to ensure consistency and reproducibility.

Data fragmentation and data silos: Isolated data across departments hinder access, visibility and the ability to comprehensively leverage analytics, resulting in duplications and inconsistencies and inaccuracies in reporting and analysis. The lack of a centralized data repository leads to inefficiencies in data retrieval and can impede collaboration due to conflicting information. Enterprises require data modernization through the integration of fragmented data sources and create a comprehensive data ecosystem that supports informed decision-making.

Inaccurate, incomplete and inconsistent data: Poor-quality data leads to inaccurate predictions and insights and biased business

outcomes. Enterprises should adopt a robust data quality management framework to ensure that the data used by AI models is complete and up to date. The heightened consciousness of quality data enables enterprises to utilize reliable ML and GenAI models. However, inaccuracies and inconsistencies in data often hinder the deployment of reliable AI models, resulting in suboptimal decision-making. The proliferation of data from diverse sources creates data overload, making it even more challenging to maintain data quality across the enterprise. All these collectively hinder the adoption of a data-driven culture for decision-making.

Need to access real-time data for decision-making: Enterprises in Europe struggle due to misalignment between planning and current market conditions due to outdated data and delayed insights to respond to market dynamics, customer preferences and emerging trends. This limits predictive analytics and AI capabilities and pushes enterprises to become reactive rather than proactive in forecasting. Real-time visibility streamlines operational metrics, enables optimal resource allocation

and substantially supports innovation and growth.

Requirement for data stream processing systems: The high velocity and volume of incoming data, such as IoT devices and cloud sources, pose significant challenges in ensuring real-time ingestion and processing. The need for advanced data stream processing systems is rising as they can dynamically handle increased loads from complex data environments and live streams and immediately process the data through automated pipelines to provide timely insights for decision-making.

Demand for personalized AI experiences: Enterprises increasingly recognize the need for personalized solutions to enhance customer engagement and utilize user behaviors and preferences to deliver tailored experiences. One of the key market demands is to create meaningful, engaging and relevant experiences through recommendation engines that suggest products, services and content. These hyperpersonalized experiences leveraging AI enable enterprises to develop customer-centric strategies for precise marketing through targeted campaigns that yield higher



conversion rates. With growing data volumes, enterprises should emphasize the importance of data literacy and analytics to foster a data-driven culture where decisions are informed by insights and fostering innovation.

Stringent data and AI regulations in Europe:

Enterprises face implementation-related challenges due to stringent European data and AI regulations, including GDPR, the EU Data Act and the EU AI Act. These regulations require substantial investments in data governance, processes and infrastructure to ensure that data handling practices are fully compliant. They emphasize consent management, mandate data localization within the EU and restrict data sharing. These associated regulatory risks and potential impositions create pressure that stifles innovation and slows AI innovation.

Chief data and AI officers are increasingly seeking the data and AI solutions below to unlock strategic insights, fuel a culture of innovation and create a more autonomous enterprise fostering human-AI collaboration. They are striving to optimize process efficiency by seamlessly integrating AI into their core

operations and proactively tackling challenges foreseeing market dynamics and future trends.

Rationalizing Data Assets Through a Single Source of Truth

Service providers aggregate data across source systems and break down data silos through a holistic data modernization process with the imperative of creating a unified and centralized dataset. This ensures consistency and integrity, eliminating inefficiencies arising from multiple versions of data floating around different departments. Centralized data also ensures maximized data consumption for analytics use cases and predictions, enhancing decision-making.

Modern Data Architectures and Platforms

As data volumes explode, service providers facilitate seamless migration and transition into cloud-based modern architectures to enable scaling of data storage and computing capabilities and enhance persona-level data access. They promote a decentralized approach through data mesh to empower teams to own and manage their data domains, fostering accountability. They also emphasize utilizing

data fabric architecture to create a unified layer integrating data across sources, including systems and streaming data.

Edge AI for Real-Time Data Analysis

Heavy engineering and manufacturing industries generate huge volumes of IoT and connected systems data, highlighting the importance of Edge AI for faster response times, reduced latency and real-time access to critical insights. These are critical for autonomous systems, industrial automation and emergency response systems to facilitate immediate actions and mitigate breakdown risks.

Next-gen Cognitive and Agentic AI

Service providers are increasingly investing in next-gen AI solutions utilizing ML, computer vision and digital twins to automate operations, reduce downtime and augment enterprise-wide decision-making through simulation models. They emphasize integrating multimodal data and adopting agentic AI models to equip autonomous decision-making, facilitating real-time insights generation across business functions. Providers also highlight developments in LLMs, SLMs, tiny LLMs and

multiagent patterns, harnessing the power of advanced language processing capabilities and autonomous systems to drive innovation and enhance CX.

XOps

Service providers have developed XOps frameworks — comprising AIOps, MLOps, DataOps, LLMops and Cloud FinOps — to accelerate development, deployment and optimization cycles at scale and cost optimization across technology, cloud infrastructure and people. This ensures continuous monitoring and streamlining of data processes, platforms, ML models, LLMs and version controls and optimizes cloud costs. These frameworks inculcate a culture of continuous improvement, refining model performance and streamlining data management.

Data Observability, Data Pipelines and Data Lineage

Maintaining the health of data ecosystems and streamlined data pipelines is critical for supporting data and AI initiatives. Service providers develop and deploy observability



solutions that provide a holistic view of data environments, enabling enterprises to monitor, track and analyze data flow and pipelines in real-time and detect data-related issues early in the pipeline. They emphasize utilizing knowledge graphs to track lineage through visual representation of data relationships and help identify data quality issues, inconsistencies and redundancies.

Automated Compliance Management

As regulations become more complex and voluminous, automation is essential for proactive compliance management, facilitating real-time monitoring and reporting. Providers blend AI-based models into compliance processes and ensure that global operations remain compliant while navigating diverse regulatory landscapes. Applying NLP techniques to process and understand unstructured data also empowers compliance teams to proactively address compliance issues before they escalate.

Data Democratization and Monetization Through Marketplace

Data abundance and innovation in business intelligence (BI) tools have spearheaded service providers to develop a data marketplace to effectively share data assets and monetize data-related products. This democratizes data through packaged data, reports and blended insights utilizing data storytelling, self-service dashboards and conversational BI.

Data Literacy Programs and Change Management

Service providers enhance data literacy to empower employees at all levels to understand, interpret and utilize data effectively. This promotes collaboration across departments by breaking down silos and encouraging data sharing, thereby unlocking the full potential of data assets. While it is important to educate employees to understand their data, providers also provide change management programs to facilitate and guide them through transitions by addressing concerns, minimizing resistance and disruption to operations.

Notes on quadrant positioning: This study assessed several analytics and AI service providers offering similar portfolio attractiveness in most quadrants. 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, midsize and specialist providers to eliminate any bias and differences arising from scale while emphasizing that it does not diminish innovation, capabilities or offerings. It also reflects providers' strategy to align their portfolio and offerings to suit market demand and enterprise needs.


Enterprises in Europe seek to realize the value of data assets by adopting cognitive AI principles to revolutionize operations and planning and fostering a culture of AI-enabled decision-making. Service providers play a pivotal role in data-to-insight transformation by developing and deploying data strategies, modern data platforms, applied AI solutions and actionable insights in real time, driving strategic growth and ROI.



Provider Positioning


	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
Accenture	Leader	Not In	Leader	Not In	Leader	Not In
adesso SE	Not In	Market Challenger	Not In	Market Challenger	Not In	Market Challenger
Akkodis	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Birlasoft	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
BJSS	Not In	Market Challenger	Not In	Market Challenger	Not In	Market Challenger
Capgemini	Leader	Not In	Leader	Not In	Leader	Not In
CGI	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Coforge	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Cognizant	Leader	Not In	Leader	Not In	Leader	Not In



 Provider Positioning


	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
Deloitte	Leader	Not In	Leader	Not In	Leader	Not In
doubleSlash	Not In	Contender	Not In	Contender	Not In	Contender
DXC Technology	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Encora	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
EPAM Systems	Market Challenger	Not In	Market Challenger	Not In	Market Challenger	Not In
Eviden (Atos Group)	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
EXL	Not In	Leader	Not In	Leader	Not In	Leader
EY	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Genpact	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In



 Provider Positioning


	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
GFT	Not In	Leader	Not In	Leader	Not In	Leader
HARMAN	Not In	Leader	Not In	Leader	Not In	Leader
HCLTech	Leader	Not In	Leader	Not In	Leader	Not In
Hexaware	Not In	Not In	Not In	Leader	Not In	Leader
IBM	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Infosys	Leader	Not In	Leader	Not In	Leader	Not In
ITC Infotech	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
it-novum	Not In	Contender	Not In	Contender	Not In	Contender
Keyrus	Not In	Market Challenger	Not In	Market Challenger	Not In	Market Challenger



 Provider Positioning


	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
Kyndryl	Contender	Not In	Contender	Not In	Contender	Not In
LTIMindtree	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Merkle	Not In	Leader	Not In	Leader	Not In	Leader
Mphasis	Not In	Leader	Not In	Leader	Not In	Leader
NTT DATA	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
OPITZ CONSULTING	Not In	Contender	Not In	Contender	Not In	Contender
Orange Business	Leader	Not In	Leader	Not In	Leader	Not In
Orion Innovation	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Persistent Systems	Not In	Leader	Not In	Leader	Not In	Leader



 Provider Positioning

	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
PwC	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Rackspace Technology	Contender	Not In	Contender	Not In	Contender	Not In
Randstad Digital	Contender	Not In	Contender	Not In	Contender	Not In
Reply	Leader	Not In	Leader	Not In	Leader	Not In
Sopra Steria	Market Challenger	Not In	Market Challenger	Not In	Market Challenger	Not In
Stefanini	Not In	Rising Star ★	Not In	Rising Star ★	Not In	Rising Star ★
TCS	Leader	Not In	Leader	Not In	Leader	Not In
Tech Mahindra	Rising Star ★	Not In	Rising Star ★	Not In	Rising Star ★	Not In
TietoEVRY	Contender	Not In	Contender	Not In	Contender	Not In

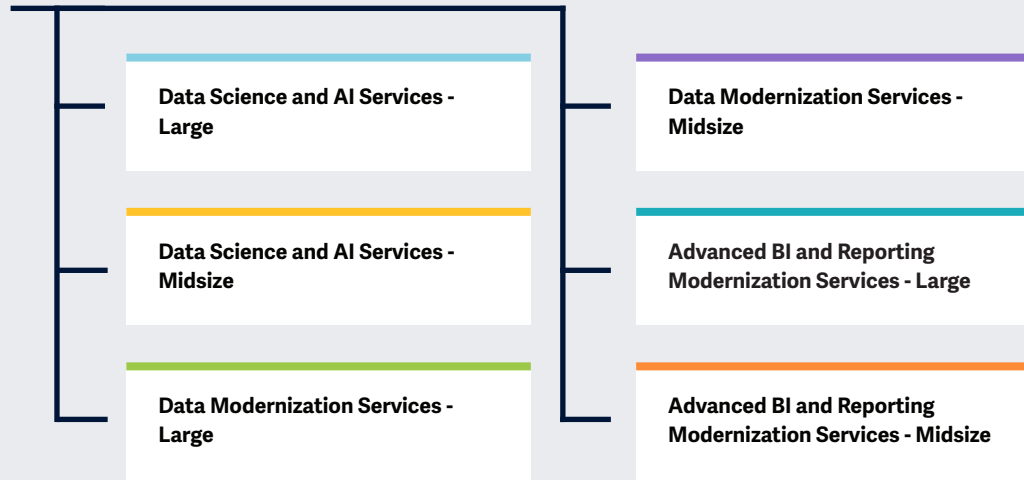


 Provider Positioning

	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
T-Systems	Leader	Not In	Leader	Not In	Leader	Not In
UST	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Valcon	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Virtusa	Not In	Leader	Not In	Leader	Not In	Leader
Wavestone	Not In	Market Challenger	Not In	Market Challenger	Not In	Market Challenger
Wipro	Leader	Not In	Leader	Not In	Leader	Not In
Xebia	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Zensar Technologies	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger



The study provides insights into the **evolving market trends** and **competitive dynamics** among **advanced analytics and AI** service providers in 2024.



Simplified Illustration Source: ISG 2024

Definition

The analytics services market has become a cornerstone of modern business strategy, essential for empowering enterprises with data-driven decision-making, operational efficiency and competitive advantages. Foundationally, the demand for clean, secure data, coupled with compelling data storytelling and visuals, is increasing as enterprises seek actionable insights.

In 2024, the relevance of analytics and AI services continues to grow, fueled by technological advancements such as GenAI. This prioritizes the need for stronger data foundations, as quality, integrity and comprehensiveness of data are crucial for producing meaningful and accurate outputs.

Enterprises are investing in advanced analytics and AI solutions to enhance operational and business performance, harnessing the true potential of data and driving informed decision-making. The shift toward augmented analytics expands the scope for data democratization, fostering a data-driven culture within enterprises, fueling innovation and agility,



and empowering the workforce to deliver actionable insights. The surge in data volumes due to the increased adoption of cloud and IoT devices is fueling the need to modernize data infrastructure to meet heightened regulatory and compliance requirements. Modern data architectures have minimized the impact of data silos, promoting data lineage and governance and presenting opportunities for data democratization and monetization.

Providers are constantly innovating and developing frameworks, accelerators, simulation models and customizable AI solutions to automate insights generation. They are emphasizing model monitoring and development through emerging techniques such as AutoML, MLOps and TinyML, making AI more integrated and efficient within business workflows.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: Data Science and AI Services - Large, Data Science and AI Services - Midsize, Data Modernization Services - Large, Data Modernization Services - Midsize, Advanced BI and Reporting Modernization Services - Large, Advanced BI and Reporting Modernization Services - Midsize.

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

- Transparency on the strengths and weaknesses of relevant providers
- 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 and AI Services - Large

Who Should Read This Section

This report is relevant to enterprises across industries globally for evaluating large providers offering AI strategy and consulting services. In this quadrant, ISG evaluates service providers offering advisory and strategy, development and system integration services based on data science and AI and assesses the evolving market dynamics in Europe. The report highlights the emerging needs of enterprises, presenting large service providers with opportunities to deliver a holistic suite of AI solutions and scaling analytics and AI initiatives to unlock data value and drive enterprise decision-making.

Large service providers deliver comprehensive AI strategies and develop customized road maps that align enterprise objectives and goals. With their expertise across multiple verticals, they offer data science and AI advisory services to solve cross-functional challenges and drive AI-led business transformation at scale, ensuring compliance. Their scale and size

enable enterprise-grade initiatives, promoting a culture of AI adoption across the enterprise value chain.

Enterprises realize the prominence of data and the need for cognitive intelligence solutions to drive innovation, improve operational metrics, mitigate risks and deliver personalized experiences. As the adoption of applied AI increases, enterprises require a synergy of deep domain expertise and competence in next-gen AI technologies, including NLP, GenAI, Computer Vision and Edge AI, to develop bespoke ML models and solutions, generating data-led insights for informed decision-making.

Large service providers are investing in AI labs to develop innovative solutions that operationalize ML-based insights and decision systems to automate processes and drive innovation.



Chief data and AI officers should use this report to explore providers that can help build data strategies, ensuring proper data governance and AI implementation to use data in AI and ML solutions.



Chief information and compliance officers should read this report to identify providers that enable AI and ML adoption, improving data integrity and scalability within enterprises' information systems.

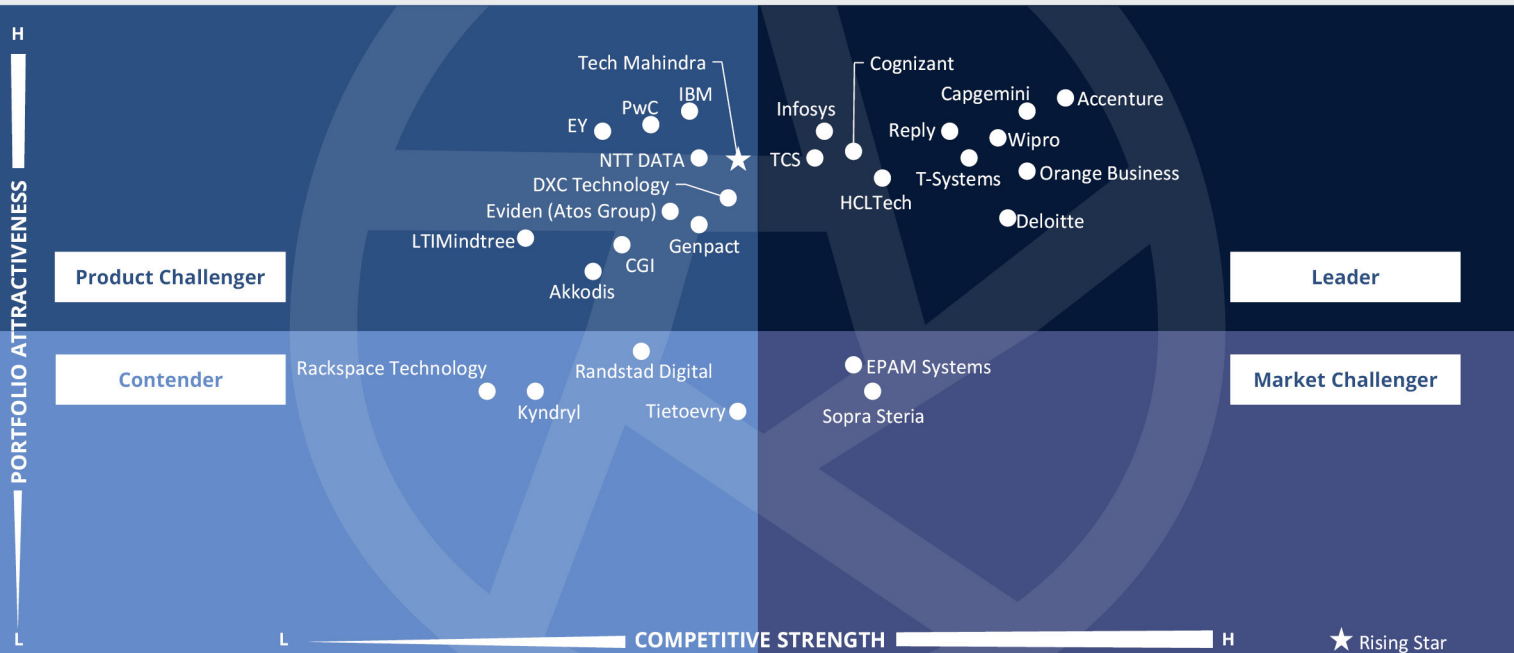


LoB managers should read this report to gain insights into providers that can assist in developing and managing ML solutions, aligning with business goals and requirements.



Research and innovation professionals should read this report to understand IP assets, such as prebuilt solutions, and the potential application of AI and ML in automating processes and use cases.





This quadrant assesses large service providers **with expertise in scientific techniques and advanced technologies, such as AI and ML**, that help large enterprises gain **insights and intelligence to drive decision-making** and achieve transformational value.

Vartika Rai



Definition

In this quadrant, ISG evaluates 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. As GenAI gains prominence, providers should help enterprises incorporate it into their comprehensive AI strategies and align their organizational objectives with GenAI capabilities. These providers address critical business challenges by combining domain knowledge and expertise in clients' industries, enabling substantial, data-driven business growth through actionable insights. Data science can 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, leveraging both structured and unstructured data.

Service providers evaluated in this study need to address enterprise requirements, including consulting, identifying business use cases, and developing statistical models and algorithms. They should be capable of modeling and customizing ML algorithms and workflows using advanced solutions to deploy their services efficiently. Providers should exhibit end-to-end capabilities in architecting, implementing, deploying and scaling enterprise-wide AI projects. They should also offer support and training services as standalone offerings, distinct from other service contracts.

Eligibility Criteria

1. Provide a **structured approach, framework and service portfolio** with proprietary offerings, including, but not limited to, **industrialized playbooks, AI and ML platforms, accelerators, advanced automation and workbenches**
2. Demonstrate established competence with a team of **data science experts**, delivering services with an **in-depth understanding of market dynamics, regulatory requirements, and the specific language** necessary for successfully delivering these services
3. Possess **technology expertise and business knowledge** of region- and **industry-specific** requirements, along with **statistical and mathematical modeling capabilities**, and provide independent advisory services
4. Possess expertise and offer solutions for **federated learning, data literacy and advanced analytics**, including computer vision, audio processing, NLP, NLG and graph DB



Observations

The regulatory landscape for AI is becoming more defined, particularly with the introduction of the EU's Artificial Intelligence Act in Europe. Enterprises are ensuring that AI is human centric, trustworthy and aligned with the values and principles of the EU. With the growing number of GenAI use cases, adhering to regulations to ensure transparency, fairness and accountability in AI processes and outcomes has become more important. Service providers are focusing on creating tailored, scalable and ethically governed AI and GenAI solutions to drive tangible business outcomes across industries. With a strong focus on responsible AI practices and rapid integration with existing systems, providers are helping enterprises seamlessly transition AI from pilot phases to full-scale production, reinforcing the role of AI in strategic digital transformation and business value generation.

Providers are offering comprehensive AI solutions and frameworks that enable enterprises to implement and scale AI efficiently across industries.

They are utilizing AI for cognitive decision-making and autonomous execution, highlighting advancements in AI's ability to manage complex tasks. To enhance capabilities and innovation within the AI space, providers are forming strategic partnerships with technology firms such as NVIDIA, hyperscalers and industry stakeholders, particularly through joint ventures and research-focused initiatives. The case studies and references indicate that AI solutions are being leveraged to improve operational efficiencies in various areas, such as supply chain management, inventory optimization and CX, demonstrating the transformative potential of AI.

From the 78 companies assessed for this study, 28 qualified for this quadrant, with eleven being Leaders and one Rising Star.

accenture

Accenture's RAI (Responsible AI) Compliance Program for the EU AI Act adheres to EU and other region-specific regulations and standards. It assists enterprises in establishing and integrating responsible practices throughout their GenAI initiatives.



Capgemini offers data and AI services tailored to CXOs and industries, emphasizing the transformation of data-powered operations. It deploys AI solutions effectively, focusing on the operationalization aspect to ensure that these solutions achieve real business value.



Cognizant aims to deliver tailor-made, strategic AI solutions that catalyze business transformation, accelerate growth and revolutionize decision-making for enterprises.

Deloitte.

Deloitte bolsters its AI and data analytics capabilities by forming strategic partnerships with technology leaders to provide innovative, agile and market-leading AI offerings.

HCLTech

HCLTech's comprehensive data science and AI services empower organizations to drive AI-led transformation through robust frameworks, responsible deployment and a focus on ethical innovation across the entire AI lifecycle.



Infosys prioritizes defining and delivering impactful results for enterprises with a value-driven, customer-focused strategy. Its asset-led transformation approach and tailored Analytics and AI solutions are designed to accelerate data-led digital transformation.



Data Science and AI Services - Large

Business

Orange Business' data science and AI offering focuses on transforming data to enhance operations and decision-making, personalize customer journeys and services and automate learning for repetitive tasks through ML.

Reply

Reply has a comprehensive set of tools and accelerators. Its MLOps Assessment Framework assesses customers' skills, processes, tools and technology utilized in the ML lifecycle in relation to AWS MLOps best practices and the MLOps Reference Architecture.



TCS has comprehensive offerings of solutions. Its TCS Cognix is an AI-driven human-machine collaboration suite that combines prebuilt solutions, an assessment framework and industry-specific solutions to accelerate enterprises' digital transformation.

Systems

T-Systems has an end-to-end data science and an AI portfolio that offers reliable and effective development. It aims to help enterprises transform into AI-driven companies.



Wipro's advisory-led approach, supported by the E-IQ framework and an AI CoE, enhances data maturity assessments and application development, enabling enterprises to achieve valuable and ethical insights from AI and data science.

Tech Mahindra

Tech Mahindra (Rising Star) focuses on democratizing technology to provide comprehensive solutions that drive operational efficiency, reduce costs and improve decision-making by integrating AI and ML into business processes.





“Orange Business offers a wide range of AI solutions, including customized and tool-agnostic options, to deliver rapid and measurable impact.”

Vartika Rai

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY23 the company generated €7.9 billion in revenue, with IT & Integration Services as its largest segment. It prioritizes the integration of IT, data and business as the foundation of a value proposition. Orange Business has a whole spectrum of data and analytics services, from data strategy, data governance, architecture, coding and specialized data services to data visualization, all contributing to a successful digital transformation journey.

Strengths

Collaboration for GenAI solution: Orange Business has recently introduced two GenAI solutions for the entire GenAI project lifecycle, from ideation to maintenance. In partnership with LightOn and HPE, Orange Business offers a SaaS solution across on-demand use cases and GPU as a Service (GPUaaS) to help businesses train and deploy custom models. Hosted on Orange Business' secure data centers in France, these solutions ensure high data security, flexible customization and efficient cost management for businesses of all sizes.

Accelerating growth: Orange Business has recently acquired Expertime as part of its Lead the Future strategic plan, expanding services across Europe. With the acquisition, Orange Business significantly strengthened

its Microsoft-dedicated practice along with data and AI capabilities to support enterprises with their digital transformation.

Holistic offering: Orange Business' AI offering delivers fast, measurable impact through tailored, tool-agnostic solutions that align with enterprises' maturity and goals. With a holistic, scalable and ethical approach, it incorporates AI governance, strategy and infrastructure while prioritizing fairness, accountability and transparency to ensure responsible deployment.

Caution

Orange Business should focus on developing more industry-specific tools and accelerators to deliver a more streamlined and accelerated experience for its customers in Europe, thereby gaining a competitive edge.





Data Science and AI Services - Midsize

Who Should Read This Section

This report is relevant to enterprises across industries globally for evaluating midsize providers offering AI strategy and consulting services. In this quadrant, ISG evaluates service providers offering advisory and strategy, development and system integration services based on data science and AI and assesses the evolving market dynamics in Europe. The report highlights the emerging needs of enterprises, presenting midsize providers with opportunities to deliver comprehensive analytics and AI solutions and use cases to unlock insights and drive enterprise decision-making.

Midsize service providers have deep competence in industry-specific expertise, targeted at a few verticals such as BFSI, healthcare, retail and manufacturing. They develop extensive knowledge of challenges and industry-specific regulations and compliance to enable seamless analytics of real-time data, elevate the CX and automate operations. These providers have the flexibility to adapt

and deliver tailored AI solutions, enabling enterprises to achieve faster time-to-insight and better governance.

Enterprises now have a strong understanding of data and AI, enabling them to capitalize significantly on operational efficiency and data-driven business decisions. Enterprises can partner with midsize service providers to expedite the development of an AI road map and strategy and deploy bespoke solutions utilizing next-gen AI technologies such as NLP, Computer Vision and GenAI.

Midsize service providers are integrating AI and ML technologies into their service offerings and positioning them distinctively through their prominence in vertical-specific capabilities to deliver differentiated business outcomes to enterprises.



Chief data and AI officers should use this report to explore providers that can help build data strategies, ensuring proper data governance and AI implementation for using data in AI and ML solutions.



Chief information and compliance officers should read this report to discover providers enabling AI and ML adoption, focusing on improving data integrity and scalability within enterprises' information systems.



LoB managers should read this report to gain insights into providers that can assist in developing and managing ML solutions that align with their business goals and requirements.



Research and innovation professionals should read this report to understand the IP assets, such as prebuilt solutions, and the potential application of AI and ML in automating processes and use cases.





This quadrant assesses midsize service providers **with expertise in scientific techniques and advanced technologies, such as AI and ML**, that help enterprises gain **insights and intelligence to drive decision-making** and achieve transformational value.

Saravanan M S



Data Science and AI 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. As GenAI gains prominence, providers should help enterprises incorporate it into their comprehensive AI strategies and align their organizational objectives with GenAI capabilities. These providers address critical business challenges by combining domain knowledge and expertise in clients' industries, enabling substantial, data-driven business growth through actionable insights. Data science can 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, leveraging both structured and unstructured data.

Service providers evaluated in this study need to address enterprise requirements, including consulting, identifying business use cases, and developing statistical models and algorithms. Providers should exhibit end-to-end capabilities in architecting, implementing, deploying and scaling enterprise-wide AI projects. They should also offer support and training services as standalone offerings, distinct from other service contracts.

Eligibility Criteria

1. Provide a **structured approach, framework and service portfolio** with proprietary offerings, including, but not limited to, **industrialized playbooks, AI and ML platforms, accelerators, advanced automation and workbenches**
2. Possess **technology expertise and business knowledge** of region- and **industry-specific** requirements, along with **statistical and mathematical modeling capabilities**, and provide independent advisory services
3. Demonstrate established competence with a team of **data science experts**, delivering services with an **in-depth understanding of market dynamics, regulatory requirements, and the specific language** necessary for successfully delivering these services
4. Possess expertise and offer solutions for **federated learning, data literacy and advanced analytics**, including computer vision, audio processing, NLP, NLG and graph DB



Observations

Enterprises in Europe demand revamping existing processes to drive transformative business outcomes. The recent investments in advanced analytics and AI highlighted their vision to realize value from their data for smarter decision-making. Having aligned their AI strategy with business objectives and focus verticals, enterprises emphasize integrating scalable AI solutions to enable seamless real-time data analytics.

Service providers incorporate a design thinking-led approach to deliver bespoke AI solutions, utilizing predictive analytics, ML, NLP, computer vision and conversational AI to facilitate data-driven decision-making across the enterprise value chain. Midsize providers possess deep expertise in focus verticals and operationalize cloud-agnostic AI solutions. They extensively collect data across sources, including streaming data and IoT devices. They apply cognitive decision science techniques to provide hyperpersonalized recommendations

to address critical challenges and enable enterprises to mitigate risks through AI-led decision-making.

These providers establish CoEs and partner with hyperscalers, niche AI companies and data cloud vendors, prioritizing innovation and codeveloping capabilities in next-generation AI use cases and solutions. Their value proposition lies in rapidly deploying customizable code modules, frameworks and solution accelerators for faster time to market. They emphasize the responsible and ethical use of AI to ensure the development of secure and trustworthy AI and ML applications.

From the 78 companies assessed for this study, 24 qualified for this quadrant, with seven being Leaders and one Rising Star.

EXL

EXL utilizes deep expertise in AI and a prebuilt suite of tools and solutions to harness the full potential of data. It integrates AI-powered insights to automate workflows, optimize decision-making and enhance CX.

GFT

GFT harnesses advanced analytics and AI capabilities to unlock business value and deliver industry-specific AI solutions to facilitate enterprisewide data-driven transformation for informed decision-making.



HARMAN Digital Transformation Solutions' data science and AI offerings enable enterprises to inculcate innovative AI solutions to improve complex operational metrics, enhance decision-making and improve business outcomes.

Merkle

Merkle's deep expertise in customer analytics, predictive modeling and AI-powered solutions helps enterprises improve customer retention and drive personalized and data-driven CX.



Data Science and AI Services - Midsize



Mphasis utilizes advanced AI algorithms and models and deep industry knowledge to enable enterprises to enhance decision-making, improve operational efficiency and unlock new growth opportunities.



Persistent Systems' expertise in advanced analytics, predictive modeling and AI-powered automation empowers enterprises to unlock data value and derive actionable insights, driving sustained growth.



Virtusa's advanced ML, predictive analytics and natural language processing (NLP) capabilities deliver customized solutions to enterprises to transform complex data into actionable insights and improve CX.



Stefanini's (Rising Star) customized AI solutions enable enterprises to solve complex business challenges, optimize workflows and achieve measurable outcomes through data-driven insights.





Data Modernization Services - Large

Who Should Read This Section

This report is relevant to global enterprises for evaluating large providers offering data modernization services. In this quadrant, ISG evaluates service providers offering data architecture, engineering, management and governance services and assesses the evolving market dynamics in Europe. The report highlights the emerging needs of enterprises, presenting large service providers with opportunities to develop modern data platforms and govern the data to provide a robust data foundation, unlocking data value and insights.

Large service providers modernize data estates and develop customized data platforms tailored to enterprise requirements. Their expertise spans end-to-end data modernization services to contextually aggregate and process structured and unstructured data across sources, including streaming and IoT devices, into actionable insights for enterprise decision-making. They promote a data-centric culture, fostering enterprises to treat data as a strategic asset.

Enterprises prioritize realizing data assets and seamless generation of actionable insights in real-time. This demands a modernized data architecture and platform featuring data lakes and warehouses to handle large volumes of enterprise data, apply algorithms and models and deliver real-time insights. Large service providers have invested in developing AI and ML-enabled data modernization accelerators and solutions that expedite processes, including migration and pipelines, enhance data quality and improve data access.

Large service providers utilize applied AI methods and technologies to oversee compliance and governance processes, mitigating risks.



Chief data officers can read this report to gain perspective on providers' analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes.



Chief information and compliance officers should use this report to discover providers enabling AI and ML adoption, focusing on improving data integrity and scalability within enterprises' information systems.

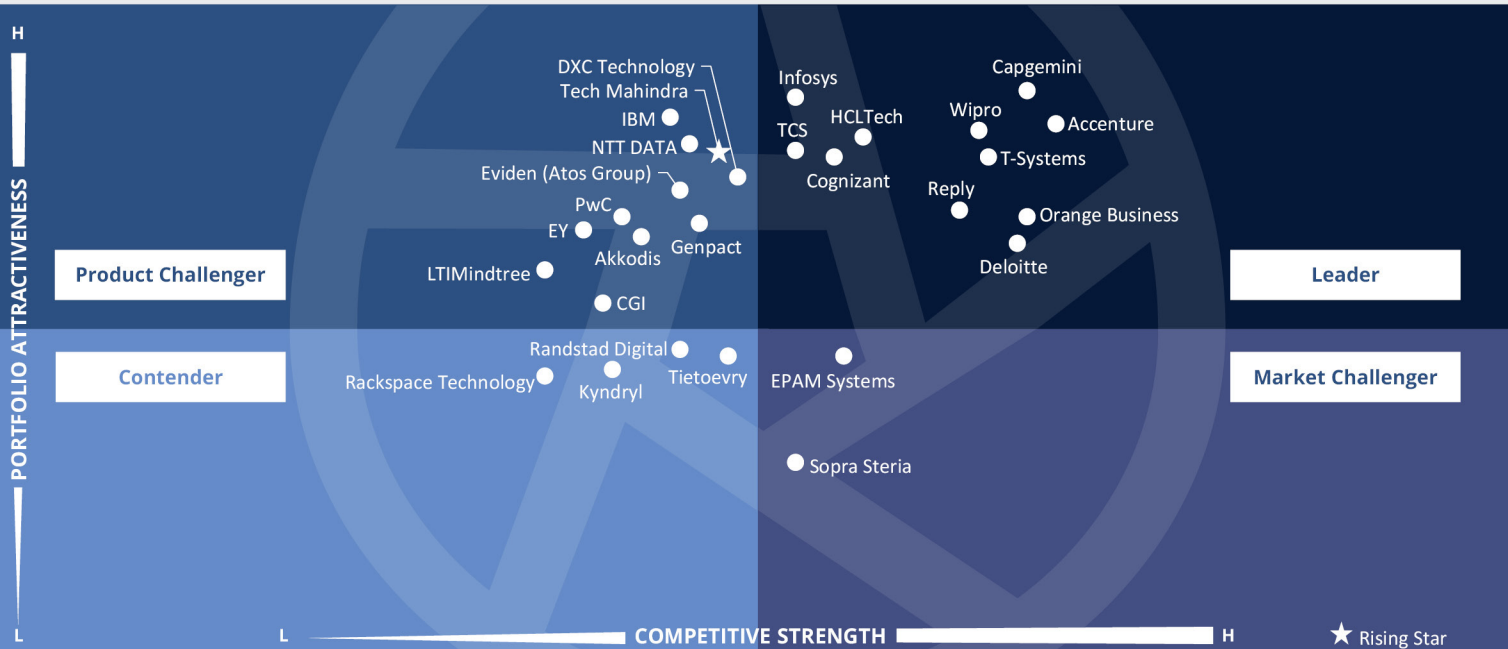


Data management professionals should read this report to understand providers' relative positioning and capabilities to implement and maintain compliance and governance standards.



Technology professionals should read this report to understand value propositions and providers' competencies in delivering seamless solutions that use data, AI and analytics.





This quadrant assesses large service providers that offer services for **modernizing data ecosystems**, including **data architectures**, pipelines, data models and also provides **data governance** to ensure regulatory compliance while **improving data quality and security**.

Vartika Rai



Data Modernization Services - Large

Definition

In this quadrant, ISG assesses providers in the data modernization services category, offering end-to-end services from data migration to management. These services aim to transform legacy systems into modern, cloud-based platforms. They encompass data engineering, utilization of modern data management tools and governance practices to ensure the delivery of high-quality, actionable data.

Providers evaluated in this quadrant should offer comprehensive consulting services, including assessment, strategy formulation and the creation of modernization roadmaps. These services encompass designing scalable data architectures, analyzing data landscapes, developing business cases and managing data lifecycles. Providers should offer data migration services, including the transfer of data to cloud platforms and executing data transformations such as cleansing and ETL operations. They should possess expertise in building data pipelines, integrating diverse datasets, and establishing modern data lakes and warehouses

for centralized data storage. Providers should also help streamline change management and improve data delivery through DataOps.

Providers' offerings should include workflow management, data modeling, data integration, master data management, metadata management and data lineage services. It is crucial for them to establish data governance strategies to uphold compliance with regulatory standards. This involves developing and implementing data governance systems, policies, and procedures to ensure effective and efficient data management. Their portfolio should include services focused on ensuring data quality, enhancing data security and control, establishing and managing data lakes, and complying with regulations such as GDPR.

Eligibility Criteria

1. Demonstrate expertise in technology and **architectural consulting** for assessment, strategy, roadmap, and **lifecycle and workflow management**
2. Provide **standardized/customized frameworks and platforms** for data aggregation and cleansing
3. Integrate systems via APIs, deploy **real-time data solutions**, and establish data lakes and warehouses
4. Possess **industry knowledge and data management and governance** capabilities to deliver data estate modernization
5. Have experience in **building data hubs, data fabrics and modular data lakes; multicloud data integration capabilities**; and access to partner data ecosystem
6. Establish **data governance strategies/best practices** and continuously ensure **data quality and security**
7. Track complete **data lineage** back to its original source to ensure integrity and accuracy throughout its lifecycle
8. Have **data engineering specialists** across regional markets



Data Modernization Services - Large

Observations

The landscape of data modernization is rapidly evolving as organizations adapt to new technologies and regulatory demands. Enterprises are transforming their data infrastructure to be more agile, scalable and secure. This involves migrating legacy systems to cloud-based or hybrid environments, enabling better data integration, storage and management. There is also a growing need for data observability, including data quality monitoring and automated insights, to ensure responsible AI development.

Providers are emphasizing modular, metadata-driven and customizable frameworks that allow enterprises to tailor data modernization approaches, enhancing speed and cost-efficiency in enterprise data journeys.

Integrating AI is prevalent, with applications ranging from prioritization and road map creation to streamlining processes, making data more accessible and actionable.

Service providers are leveraging partnerships with firms such as Databricks, Snowflake, Azure and Informatica to deliver tailored and scalable solutions. Proprietary accelerators

are being utilized to expedite cloud and data modernization, enabling enterprises to reduce development timelines and gain faster access to insights. With strong governance frameworks, particularly for European regulations such as GDPR, providers are enabling enterprises to navigate complex regulations while ensuring data security, privacy and integrity. To support enterprises in their data estate modernization, providers are offering end-to-end data modernization solutions, ensuring comprehensive support throughout the transformation journey, from strategy development to implementation and governance.

From the 78 companies assessed for this study, 28 qualified for this quadrant, with eleven being Leaders and one Rising Star.



Accenture empowers enterprises to become data-driven by leveraging modern data and cloud platforms, agile analytics and transformative data culture. It employs automation to help enterprises integrate large volumes of data from various sources across the enterprise.



Capgemini accelerates clients' data and AI journeys through innovative frameworks and methodologies, delivering trusted and secure data products and AI models at scale to maximize value in a hybrid multicloud environment.



Cognizant, with its multiple tools and accelerators and strategic collaborations with technology leaders, enables cost-effective modernization, enhanced insights and digital innovation across industries.



Deloitte utilizes its expertise to create and implement the data architecture, pipelines and solutions essential for responsible data use while establishing supporting data management enterprises.



HCLTech's business-driven, data-first approach transforms data platforms into future-ready, real-time intelligence hubs, while its automation-first approach embeds automation throughout data engineering to enhance processes.



Data Modernization Services - Large



Infosys delivers data modernization services to enterprises encompassing the complete data modernization lifecycle, integrating AI and GenAI and is backed by a range of tools and solutions.

Business

At **Orange Business**, data governance is key to IT redesign and digital initiatives, ensuring quality, regulatory compliance, protection against unauthorized access, metadata management and reference data optimization through employee engagement.

Reply

Storm Reply, a **Reply** Group company, has governance and strategy practices that provide value to enterprises by thoroughly comprehending the intricacies of data governance programs and how they adapt to changes in the business environment and technology.



TCS provides a wide range of solutions that assist enterprises at various stages of data and analytics maturity in transitioning to a data product-centric ecosystem.

T Systems

T-Systems cultivates a data-centric mindset across the enterprises by providing advanced tools, infrastructure and expertise to empower informed decision-making.



Wipro's advisory-led approach, in collaboration with a robust partner ecosystem, focuses on designing data architectures and transitioning strategies tailored to industry-specific needs, enhancing data literacy and aligning with business objectives.



Tech Mahindra (Rising Star) offers an integrated, intelligent approach to data modernization, unifying all data functions into a seamless solution for streamlined operations, efficient data modernization and future-ready infrastructure.





“Orange Business adopts a robust strategy for compliance with European regulations and provides platform and management services for essential cloud applications, guaranteeing data security, privacy, integrity and sovereignty.”

Vartika Rai

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY22 the company generated €7.9 billion in revenue, with IT & Integration Services as its largest segment. It prioritizes the integration of IT, data and business as the foundation of a value proposition. Orange Business offers data governance solutions that focus on enhancing data quality, managing data usage, ensuring regulatory compliance, protecting against unauthorized access, mapping corporate data with clear metadata management and optimizing reference data for consistent utilization in IT and applications.

Strengths

Compliant by design: The evolving landscape of European regulations, including NIS2, the Corporate Sustainability Reporting Directive and GDPR, significantly impacts businesses' data infrastructure. To address the complex challenges associated with data infrastructure, Orange Business evaluates the essential components: storage, processing and networking. It adopts a comprehensive approach that emphasizes seamless interoperability and integration within existing ecosystems and future technological frameworks. Additionally, Orange Business offers platform and management services for critical cloud applications, ensuring data security, privacy, integrity and sovereignty.

Accelerating data initiative:

Orange Business helps enterprises create a seamless modular solution tailored to their strategy and infrastructure through the company's cutting-edge data platform framework. It designs and implements solutions to empower businesses by creating a balance between established technology and the latest innovations. It offers tangible benefits such as scalability, reduced data latency, streamlined cost efficiency, elevated data quality, flexible data processing, future-proofed architecture and innovatively ecoconscious data platforms.

Caution

Orange Business should demonstrate more case studies and references highlighting its implementation of complex data architectures, such as data mesh and data fabric, while providing end-to-end data modernization services to further strengthen its positioning in the data modernization area.





Data Modernization Services - Midsize

Who Should Read This Section

This report is relevant to global enterprises for evaluating midsize providers offering data modernization services. In this quadrant, ISG evaluates service providers offering data architecture, engineering, management and governance services and assesses the evolving market dynamics in Europe. The report highlights the emerging needs of enterprises, presenting midsize service providers with opportunities to develop modern data platforms and govern the data to provide a robust data foundation, unlocking data value and insights.

Midsize service providers enable enterprises to transition to modern cloud-based infrastructures and platforms that ensure data security and compliance. They provide diverse data services, including data migration, management and governance. Their value proposition is providing verticalized data foundations tailored to enterprise requirements with their deep industry expertise and domain-centric data models, accelerating data platform transformations.

Firms are realizing the importance of leveraging data assets to seamlessly generate real-time actionable insights. This demands a modernized data architecture and platform featuring data lakes and data warehouses to handle large volumes of enterprise data, apply algorithms and deliver real-time insights. Midsize service providers have developed several NLP and ML-enabled data engineering and management accelerators and solutions to expedite service delivery processes across the data lifecycle.

Midsize service providers are expanding strategic partnerships with hyperscalers and cloud data vendors to codevelop capabilities and solutions that accelerate the modernization of data ecosystems and enable the consumption of analytics.



Chief data officers can refer to this report to gain perspective on effective analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes.



Chief information and compliance officers should read this report to discover providers enabling AI and ML adoption, focusing on improving data integrity and scalability within enterprises' information systems.

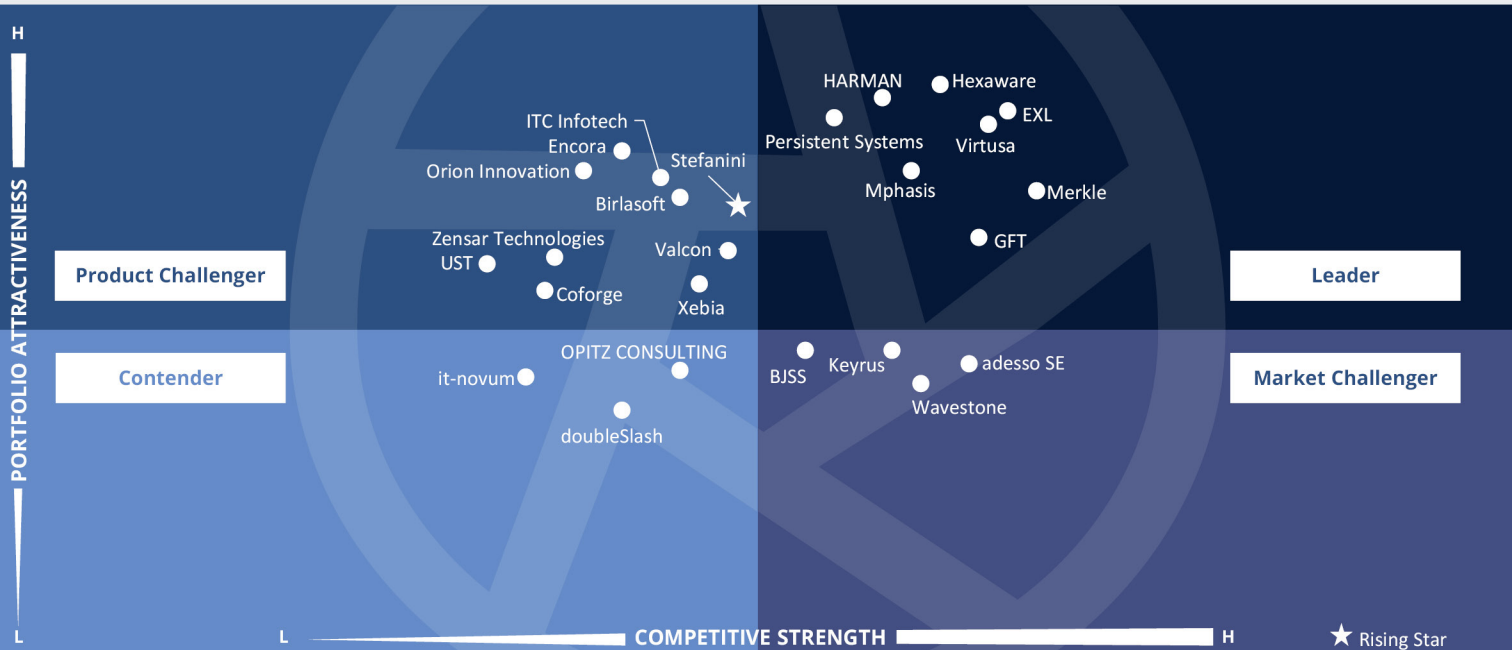


Data management professionals should read this report to understand providers' relative positioning and capabilities to implement and maintain compliance and governance standards.



Technology professionals should read this report to understand value propositions and providers' competencies in delivering seamless solutions using data, AI and analytics.





This quadrant assesses midsize service providers that offer services for **modernizing data ecosystems**, including **data architectures**, pipelines, data models and also provides **data governance** to ensure regulatory compliance while **improving data quality and security**.

Saravanan M S



Data Modernization Services - Midsize

Definition

In this quadrant, ISG assesses providers in the data modernization services category, offering end-to-end services from data migration to management. These services aim to transform legacy systems into modern, cloud-based platforms. They encompass data engineering, utilization of modern data management tools and governance practices to ensure the delivery of high-quality, actionable data.

Providers evaluated in this quadrant should offer comprehensive consulting services, including assessment, strategy formulation and the creation of modernization roadmaps. These services encompass designing scalable data architectures, analyzing data landscapes, developing business cases and managing data lifecycles. Providers should offer data migration services, including the transfer of data to cloud platforms and executing data transformations such as cleansing and ETL operations. They should possess expertise in building data pipelines, integrating diverse datasets, and establishing modern data lakes and warehouses

for centralized data storage. Providers should also help streamline change management and improve data delivery through DataOps.

Providers' offerings should include workflow management, data modeling, data integration, master data management, metadata management and data lineage services. It is crucial for them to establish data governance strategies to uphold compliance with regulatory standards. This involves developing and implementing data governance systems, policies, and procedures to ensure effective and efficient data management. Their portfolio should include services focused on ensuring data quality, enhancing data security and control, establishing and managing data lakes, and complying with regulations such as GDPR.

Eligibility Criteria

1. Demonstrate expertise in technology and **architectural consulting** for assessment, strategy, roadmap, and **lifecycle and workflow management**
2. Provide **standardized/customized frameworks and platforms** for data aggregation and cleansing
3. Integrate systems via APIs, deploy **real-time data solutions**, and establish data lakes and warehouses
4. Possess **industry knowledge and data management and governance** capabilities to deliver data estate modernization
5. Have experience in **building data hubs, data fabrics and modular data lakes; multicloud data integration capabilities**; and access to partner data ecosystem
6. Establish **data governance strategies/best practices** and continuously ensure **data quality and security**
7. Track complete **data lineage** back to its original source to ensure integrity and accuracy throughout its lifecycle
8. Have **data engineering specialists** across regional markets



Data Modernization Services - Midsize

Observations

Enterprise data ecosystems evolve massively in size and require modern data platforms and architectures. The heightened compliance and regulations are forcing enterprises to align their data ecosystems with European data and AI acts. Enterprises prioritize building, managing and governing modern data ecosystems to unlock data value and empower business users to access real-time data to drive decision-making. There has been an increased emphasis on data centricity and democratization for access, which increases focus on data awareness and literacy.

Midsize providers help modernize data infrastructures, utilize automated tools throughout the modernization process and streamline data accessibility. These providers utilize ML and NLP techniques to automate data discovery, ensure the accuracy of data mappings, minimize errors, improve data quality and automate data pipelines for faster migrations. Their seamless integration with cloud platforms and utilization of predictive analytics enhance migration planning and mitigate risks. The demand to promote

domain-specific data ownership has led service providers to develop capabilities in implementing decentralized architectures such as data mesh, creating a collaborative and scalable environment that realizes the value of data assets and optimizes data product delivery.

With the growing reliance on data and associated risks, these providers strongly emphasize data trustworthiness, localization, security, privacy and compliance with regulations. They have partnerships with hyperscalers and data governance vendors and employ robust measures to ensure accurate and efficient data lineage tracking.

From the 78 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders and one Rising Star.

EXL

EXL's data modernization services transform legacy systems into agile, cloud-based architectures with enhanced data management capabilities and optimizing data workflows.

GFT

GFT ensures seamless migration to modern data platforms, unlocking the full potential of data to drive insights and data-driven decisions while maintaining data quality, security and compliance.



HARMAN Digital Transformation Solutions transforms legacy systems into agile and scalable data environments, ensuring data accessibility and data quality to support real-time analytics and decision-making.

HEXAWARE

Hexaware's solution-oriented approach to modernizing enterprise data environments emphasizes delivering and unlocking data value, supported by ecosystem development with partners.

Merkle

Merkle's deep expertise in managing customer data helps enterprises modernize data infrastructure, deliver intelligent insights for decision-making and drive personalized CX.



Mphasis differentiates itself through its deep domain expertise and advanced modernization solutions, ensuring impactful outcomes from data transformation initiatives.



Data Modernization Services - Midsize



Persistent Systems' ML-infused Data Quality Solution enhances data integrity and reliability across enterprises by implementing a comprehensive framework to maintain high standards of data accuracy, completeness and consistency.



Stefanini (Rising Star) implements automated data lineage tracking tools that map the flow of data, maintain data integrity and ensure consistency in governance policies followed throughout the data lifecycle.

virtusa

Virtusa's approach to data modernization facilitates seamless data orchestration, optimizes data ecosystems and fosters the implementation of robust data management practices, ensuring data security and governance throughout the lifecycle.





Advanced BI and Reporting Modernization Services - Large

Advanced BI and Reporting Modernization Services - Large

Who Should Read This Section

This report is relevant to enterprises across industries globally for evaluating large providers offering BI and reporting modernization services. In this quadrant, ISG evaluates service providers offering modernizing and implementing BI tools and infrastructure to generate actionable insights beyond traditional data visualizations and assesses the evolving market dynamics in Europe. The report highlights the emerging needs of enterprises, presenting large service providers with opportunities to streamline the integration of self-service BI tools and democratize data.

Large service providers prioritize consuming analytics and insights through interactive channels to enhance decision-making. Their core expertise lies in an accelerated approach to rationalizing, consolidating, migrating and modernizing BI platforms to generate real-time insights. They combine business insights with collaborative tools and deliver timely intelligence across business functions.

Enterprises demand impactful insights and real-time monitoring of key performance metrics to promptly respond to market dynamic shifts based on data. The demand for impactful insights necessitates the usage of modern reporting infrastructure and BI platforms to handle increasingly complex datasets, integrating data from cloud platforms and IoT devices to transform complex data into insights. Large service providers have developed multidimensional solutions to engage users, processes and technology for BI adoption and insights delivery.

Large service providers embed NLP, predictive analytics and GenAI into BI tools to provide enterprises with real-time visual insights through interactive dashboards and conversational experiences.



Chief data officers can refer to this report to gain perspective on effective analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes.



Chief analytics officers (CAOs) can refer to this report to gain perspective on providers' tools and technologies for data analysis and reporting and define strategies to integrate analytics into business.



Technology professionals should read this report to understand value propositions and providers' competencies in delivering seamless solutions using data, AI and analytics.

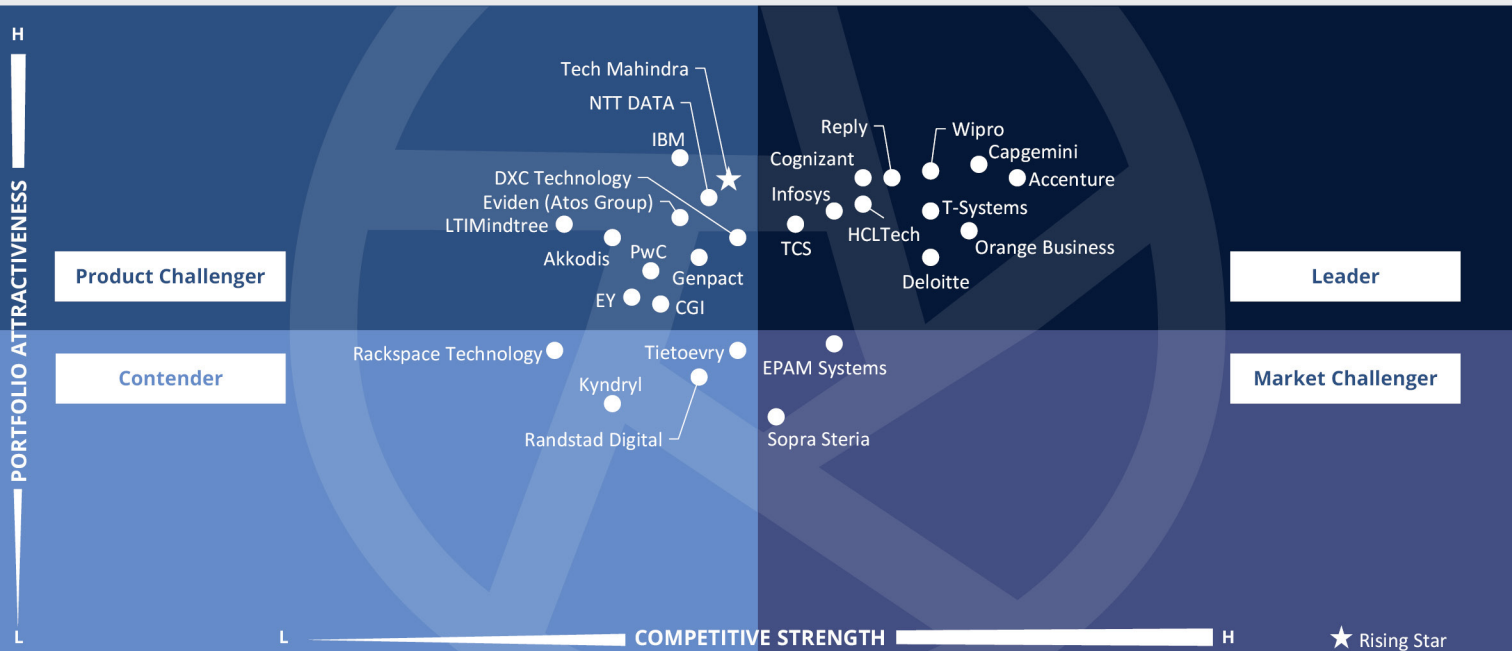


LoB managers should read this report to gain insights into providers that can assist in generating actionable insights and intelligence, aligning them with their business goals and requirements.



Advanced Analytics and AI Services
Advanced BI and Reporting Modernization Services - Large

Europe 2024



This quadrant assesses large service providers offering **self-service analytics** to empower business users with **interactive visualizations and conversational experiences**. It also integrates **AI models** to transform raw data into actionable intelligence in real time.

Vartika Rai



Advanced BI and Reporting Modernization Services - Large

Definition

In this quadrant, ISG evaluates service providers offering advanced business intelligence (BI) and reporting modernization services. These providers employ sophisticated approaches to transform raw data into actionable insights, providing intelligence beyond traditional data visualization or basic reporting. These services are vital for enterprises looking to harness data strategically, enabling business leaders to unlock their full potential.

Several trends shape the future of advanced BI and reporting services. Cloud solutions gain popularity for scalability, affordability and easy deployment. Self-service analytics empowers business users to explore data independently, fostering a data-driven culture. Integration of AI and ML automates tasks, providing real-time insights for proactive decision-making.

Providers specializing in advanced BI and reporting excel in managing large amounts of data, integrating multiple data sources, and delivering real-time, dynamic reporting crucial for strategic decision-making across organizations. They demonstrate expertise in leveraging cloud-based platforms for scalability and computational power necessary for complex analytics tasks. These providers excel in integrating and implementing sophisticated BI tools to create interactive dashboards and customized reports tailored to various stakeholders' needs. They also specialize in integrating data from diverse sources, including ERP systems, CRM platforms, social media and IoT devices.

Eligibility Criteria

1. Connect disparate data sources, cleanse and transform data, handle **complex data structures**, **integrate real-time and historical data** and **ensure data quality**
2. Utilize **analytics techniques, including ML, predictive modeling and statistical analysis**, to uncover hidden patterns, identify trends, and predict outcomes from historical data
3. **Tailor services/solutions to specific industry/business needs**, understanding the unique challenges and opportunities across verticals
4. **Design and deploy interactive dashboards, reports and visualizations** that communicate complex data insights to technical and non-technical audiences and create compelling data stories
5. Offer **flexible deployment options, including cloud-based solutions, on-premises installations, or hybrid models** tailored to existing infrastructure and security needs
6. Provide **ongoing support and training** for the effective use of BI



Advanced BI and Reporting Modernization Services - Large

Observations

Enterprises are now increasingly aiming to democratize data, ensuring it is accessible at all levels of the organization, which supports non-technical users and fosters a data-driven culture. This shift facilitates informed, data-driven decision-making and requires tools that promote self-service analytics. There is a growing demand for cloud-based solutions that offer flexibility, scalability and cost-effectiveness, enabling organizations to share insights and collaborate in real time. To achieve these goals, enterprises are modernizing their traditional business intelligence (BI) tools by adopting modern solutions with interactive dashboards and real-time reporting capabilities.

Providers are focusing on delivering comprehensive, advanced BI and reporting services encompassing advisory, assessments, self-service enablement and transformation road maps, all aimed at enhancing data accessibility and supporting decision-making. Moreover, the integration of AI and GenAI capabilities into BI platforms is rising. These advancements provide features such as sentiment analysis, anomaly detection and

natural language querying, enhancing insights, elevating CX and improving operational efficiency. Additionally, providers are equipping enterprises with effective data storytelling tools that create user-friendly and impactful visualizations, transforming complex data into clear and actionable narratives.

To nurture a data-centric culture, these providers are also supporting talent development and training initiatives while promoting change management practices, thereby making data a core element of enterprise transformation.

From the 78 companies assessed for this study, 28 qualified for this quadrant, with eleven being Leaders and one Rising Star.



Accenture provides a Data Self-Service solution that helps enterprises access and prepare data quickly and derive accurate and contextual insights.



Capgemini empowers enterprises to achieve better decision-making through actionable insights from dynamic data visualization via its investment in the Toucan Toco platform, which ensures accessibility for non-technical users.



Cognizant's Advanced BI and reporting services focus on accelerating and streamlining enterprises' BI journey through proprietary capabilities and accelerators and leveraging solutions cocreated through partnerships with leading BI technology providers.



Deloitte helps enterprises achieve AI insights and engagement by utilizing advanced autonomous algorithms to enhance human decision-making, producing highly actionable predictions and insights from data.



HCLTech delivers an integrated approach to analytics through AI-enhanced BI solutions and a robust training program for sustained user adoption, empowering organizations with real-time insights and continuous learning.



Infosys offers comprehensive advanced BI and reporting modernization services, including advisory, dashboard development and cognitive assistant and digital analyst services, to enhance data accessibility and decision-making.



Advanced BI and Reporting Modernization Services - Large

Business

Orange Business enhances customer service by providing tools for a deeper understanding of customer behavior and market dynamics through data visualization and analysis, which helps clarify cause-and-effect relationships.

Reply

Reply with its multiple tools, accelerators and knowledge in advanced business intelligence solutions, helps enterprises advance toward a future centered on data-driven decision-making.



TCS helps enterprises maximize business value through data-driven insights with TCS Dexam, a solution that powers data exchange across the ecosystem to derive actionable insights.

T Systems

T-Systems enables enterprises to transform their data into a strategic asset by providing tailored BI modernization road maps and fostering a data ownership culture to uncover insights, enhance operational efficiency and drive innovation.



Wipro's comprehensive services focus on scaling insights across enterprises and its ecosystem by transforming and managing the BI landscape to help stakeholders make decisions and provide a forward-looking perspective.

Tech Mahindra

Tech Mahindra (Rising Star) is leveraging automation, prebuilt KPIs and customizable dashboards to accelerate analytics and reporting and drive impactful BI transformation that is agile, customer-focused and optimized for efficient, data-driven decision-making.





“Orange Business possesses robust data storytelling capabilities delivered through its Dashboard Design Methodology framework, facilitating informed decision-making.”

Vartika Rai

Orange Business

Overview

Orange Business is headquartered in Paris, France. It has more than 30,000 employees across over 100 offices in 65 countries. In FY22 the company generated €7.9 billion in revenue, with IT & Integration Services as its largest segment. Orange Business enhances customer service by facilitating a deeper understanding of customer behavior and market dynamics through data. Its approach enables greater visualization and analysis to uncover cause-and-effect relationships. It helps enterprises turn raw data into actionable insights through advanced dashboard design, enabling informed decision-making at every organizational level.

Strengths

Creating a data-centric enterprise: Orange Business empowers enterprises to cultivate a culture of open exchange and collaboration through its data-centric approach. The company provides personalized coaching, interactive webinars and tailored training to clients’ teams, supporting enterprises’ transformation journey through a comprehensive toolset. Its modern data platform framework enables seamless data culture integration across the data lifecycle.

Improving business with enhanced decision-making: Orange Business’ Flux Vision is a mobile data analytics solution that provides statistical indicators of customers’ attendance, patterns of movements and segmentation information based on technical information from the Orange mobile

network. It uses an algorithm that ensures anonymization by deleting all personal data and complies with the recommendations of the CNIL and the GDPR. It provides local-level data with customization options in interactive visualization.

Impactful dashboard experience: Orange Business helps enterprises create top-notch dashboards with a focus on content, user friendliness and experience, ensuring swift results and smooth transitions. It provides advanced dashboard design, enabling informed decision-making at every organizational level, comprehensive assessment and benchmarking services.

Caution

Orange Business should focus on integrating GenAI into its business intelligence solutions to enhance its advanced BI and reporting services further and focusing on GenBI.





Advanced BI and Reporting Modernization Services - Midsize

Who Should Read This Section

This report is relevant to global enterprises for evaluating midsize providers offering BI and reporting modernization services. In this quadrant, ISG evaluates service providers offering modernizing and implementing BI tools and infrastructure to generate actionable insights beyond traditional data visualizations and assesses the evolving market dynamics in Europe. The report highlights the emerging needs of enterprises, presenting midsize providers with opportunities to streamline the integration of self-service BI tools and democratize data.

Midsize providers enable enterprises to transform data into insights and actions by streamlining BI and reporting infrastructure and processes with cloud-based and serverless solutions. They emphasize enhancing data accessibility and usability through self-service BI and analytics tools and foster a data-driven culture with intuitive and interactive dashboards and reports. They embed advanced

analytics and AI techniques into BI solutions and generate deeper insights for agile decision-making at scale.

Enterprises are increasingly aware of democratizing data and promoting an insights-driven culture through industry-specific BI solutions enhanced by real-time analytics capabilities for IoT and streaming data. Midsize providers have developed accelerators and solutions to create compelling persona-based visualizations and interactive dashboards for users.

Midsize providers leverage partnerships with leading BI platforms and increasingly invest in integrating NLP, AI and ML to enhance contextual BI capabilities to provide real-time insights.



Chief data officers can read this report to gain perspective on effective analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes.



Chief analytics officers (CAOs) can read this report to gain perspective on tools and technologies for data analysis and reporting and define strategies to integrate analytics into business.



Technology professionals should read this report to understand value propositions and providers' competencies in delivering seamless solutions that use data, AI and analytics.

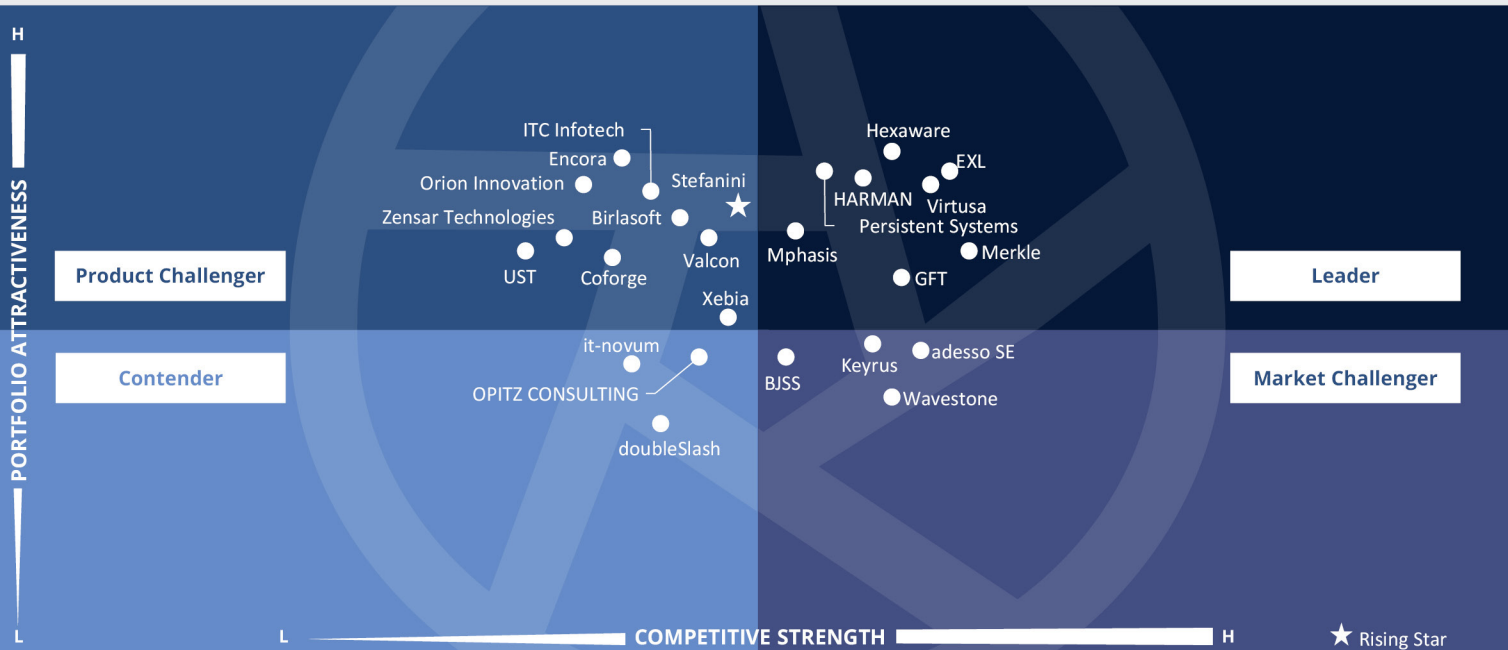


LoB managers should read this report to gain insights into providers that can assist in generating actionable insights and intelligence, aligning them with their business goals and requirements.



Advanced Analytics and AI Services
Advanced BI and Reporting Modernization Services - Midsize

Europe 2024



This quadrant assesses midsize providers offering **self-service analytics** to empower business users with **interactive visualizations and conversational experience**, along with integrating **AI models** to transform raw data into actionable intelligence in real time.

Saravanan M S



Advanced BI and Reporting Modernization Services - Midsize

Definition

In this quadrant, ISG evaluates service providers offering advanced business intelligence (BI) and reporting modernization services. These providers employ sophisticated approaches to transform raw data into actionable insights, providing intelligence beyond traditional data visualization or basic reporting. These services are vital for enterprises looking to harness data strategically, enabling business leaders to unlock their full potential.

Several trends shape the future of advanced BI and reporting services. Cloud solutions gain popularity for scalability, affordability and easy deployment. Self-service analytics empowers business users to explore data independently, fostering a data-driven culture. Integration of AI and ML automates tasks, providing real-time insights for proactive decision-making.

Providers specializing in advanced BI and reporting excel in managing large amounts of data, integrating multiple data sources, and delivering real-time, dynamic reporting crucial for strategic decision-making across organizations. They demonstrate expertise in leveraging cloud-based platforms for scalability and computational power necessary for complex analytics tasks. These providers excel in integrating and implementing sophisticated BI tools to create interactive dashboards and customized reports tailored to various stakeholders' needs. They also specialize in integrating data from diverse sources, including ERP systems, CRM platforms, social media and IoT devices.

Eligibility Criteria

1. Connect disparate data sources, cleanse and transform data, handle **complex data structures**, **integrate real-time and historical data**, and ensure **data quality**
2. Utilize **analytics techniques**, including **ML, predictive modeling and statistical analysis**, to uncover hidden patterns, identify trends, and predict outcomes from historical data
3. **Tailor services/solutions to specific industry/business needs**, understanding the unique challenges and opportunities across verticals
4. **Design and deploy interactive dashboards, reports and visualizations** that communicate complex data insights to technical and non-technical audiences and create compelling data stories
5. Offer **flexible deployment options**, including **cloud-based solutions, on-premises installations, or hybrid models** tailored to existing infrastructure and security needs
6. Provide **ongoing support and training** for the effective use of BI



Advanced BI and Reporting Modernization Services - Midsize

Observations

Enterprises prioritize democratizing data across business personas, including technical and non-technical users. The adoption of BI tools has advanced significantly, resulting in the need to consolidate and modernize intelligent insights and reporting architectures. This shift emphasizes the adoption of modern self-service BI tools equipped with interactive dashboards and real-time reporting capabilities.

Midsize providers enable enterprises to migrate and seamlessly integrate modern BI tools while modernizing their reporting infrastructure with cloud-based and serverless solutions. The end-to-end insights generation transforms enterprise data into insights through bespoke road map development, technology stack implementation, operational and real-time reporting, and self-service solutions. They have established data insights CoEs to scale capabilities in CX-driven insights and foster a culture of data-driven decision-making. The significance of the data surge has led enterprises to reorient toward centralized access and automated report generation capabilities. Midsize providers have started

integrating NLP, GenAI and LLMs to automate report generation and enable business users to derive more in-depth and personalized insights from conversational experiences in real time.

These providers equip business users to access, explore and analyze data with self-service BI tools and generate deeper and actionable insights utilizing predictive, prescriptive and ML models. These providers have invested in ML-based visualization and verticalized insights solutions to provide customized visualizations and insights.

From the 78 companies assessed for this study, 25 qualified for this quadrant, with eight being Leaders and one Rising Star.

EXL

EXL's verticalized focus approach to BI services enables enterprises to unlock the full potential of data to streamline insights consumption by transforming data into insights and actions.

GFT

GFT enables enterprises to develop an agile, insights-rich data ecosystem and intelligent BI systems featuring interactive dashboards that fuel business agility and strategic decision-making.



HARMAN Digital Transformation Solutions

utilizes GenAI and integrates modern analytics tools to enhance reporting capabilities, enabling real-time insights and streamlined data visualization, empowering enterprises to make informed decisions.

HEXAWARE

Hexaware designs and develops custom reports tailored to meet specific business users' requirements, enabling them to visualize key metrics and derive insights from complex datasets.

Merkle

Merkle provides a comprehensive approach to transforming outdated BI systems into dynamic, data-centric platforms with interactive dashboards, enabling real-time insights and self-service capabilities.



Mphasis develops dynamic dashboards that empower users across various business roles to conduct complex analyses and generate reports independently while ensuring data security and compliance.

Persistent

Persistent Systems dashboarding capabilities empower enterprises with real-time reporting, automated insights and customizable interfaces, ensuring responsible data privacy practices.



virtusa

Virtusa's deep industry expertise and visualization capabilities empower enterprises to streamline BI infrastructure, insights generation and consumption in real-time through analytics dashboards and scorecards.



Stefanini (Rising Star) modernizes the BI landscape and integrates GenAI to equip enterprises with deeper real-time data analysis, processing and dashboard automation, ensuring a more agile response to market dynamics to drive growth.





Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.



Appendix

The ISG Provider Lens 2024 – Advanced Analytics and AI 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 study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

1. Definition of Advanced Analytics and AI 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

Lead Author



Saravanan M S
Research Specialist

Saravanan M S is a Research Specialist at ISG and is responsible for supporting and Co-Authoring ISG Provider Lens™ studies on Advanced Analytics & AI Services and Specialty Analytics Services Series featuring Retail, Supply Chain, Life Sciences and Healthcare verticals. In this role, he aids the lead analysts in the research process and is the author of the global summary report. He also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments.

Saravanan has seven 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.

Co-Author



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Senior Research Analyst

Vartika Rai is a senior research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Advanced Analytics and AI 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.



Author & Editor Biographies

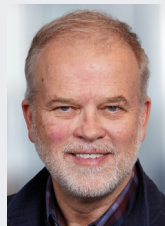


Study Sponsor

Namratha Dharshan
Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens™ program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens™ program.

She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance. She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.



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 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™

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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iSG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including AI and automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





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