ISG Provider Lens™

Analytics Services

Data Science Services

Germany. 2021

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

December 2021

Customized report courtesy of:

orange Business Services

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The market research and analysis data presented in this report includes research information from the ISG Provider Lens™ program as well as from ongoing ISG research programs, conversations with ISG advisors, briefings with service providers, and analysis of publicly available market information from a variety of sources. In ISG's opinion, the data and information collected for this report is the current as of August 2021 for both vendors who actively participated and vendors who did not participate. Interim mergers and acquisitions and related changes are not reflected in this report.

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

The principal author of this report is Holm Landrock. The editors are Mark Brownstein, Ambrosia Sabrina and Katharina Kummer. The research analyst is Srujan Akurathi and the data analyst is Hema Gunapati. The reviewer for quality and consistency is Dries Ballerstedt.

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EXECUTIVE SUMMARY

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Long-time analytics users leverage large data warehouses for their tasks often in parallel. In the course of cloudification of their IT landscape, these users want to use the services of IT service providers for the operation of analytical applications. Users that have only been exposed to analytics in recent years are looking for practical and functional solutions that do not require them to manage their own data warehouses.
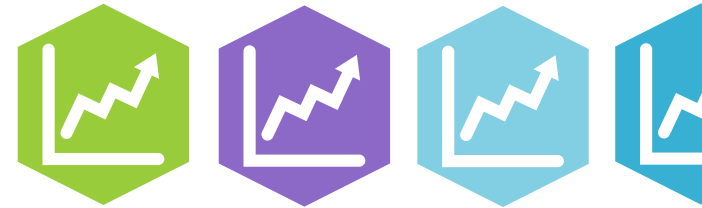
At the same time, providers should focus on staff management and employee motivation. The Young Professional Attractiveness Index 2021 (YPAI), in cooperation with the market research institute Kantar, has listed down the most popular employers in Germany. Of

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

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

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

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

Introduction

Simplified illustration

Analytics Services 2021

Data Analytics Services

Data Science Services	Data Engineering Services	Data Lifecycle Management Services
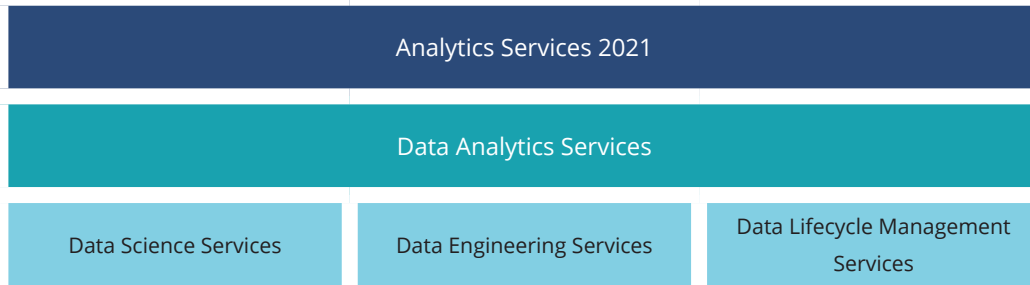
Source: ISG 2021

Definition

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

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

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Definition (cont.)

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

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

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

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

Definition (cont.)

Scope of the report

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

- A transparent presentation of the strengths and weaknesses of the respective providers

- Differentiated positioning of suppliers according to segments

- View of various markets: Germany, Brazil, and the U.S.

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

Provider Classifications

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

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

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

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

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

Product Challenger

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

Market Challenger

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

Contender

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

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Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

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

Not In

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

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Analytics Services - Quadrant Provider Listing 1 of 3

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

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Analytics Services - Quadrant Provider Listing 2 of 3

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

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Analytics Services - Quadrant Provider Listing 3 of 3

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

Analytics Services Quadrants

ENTERPRISE CONTEXT

Data Science Services

In this quadrant, ISG evaluates the changing dynamics of data science services. These services are offered by service providers that use analytics-based methods, processes, algorithms and systems to extract knowledge, patterns and conclusions from both structured and unstructured data. ISG defines the current positioning of data science services providers in Germany, along with their relative strengths.

Data science services primarily enable enterprises to establish digital business processes. Due to the pandemic, enterprises have accelerated their spending on AI, machine learning and natural language processing (NLP) due to their need to monetize data for better strategic outcomes. New-age technologies, including computer vision and video, audio and emotion analytics are gaining popularity among enterprises across industry verticals in Germany to gain data insights. Data science services have overcome their limitations to include innovative service packages such as data science as a service, data science platforms and accelerators for enterprises in Germany.

During the pandemic, enterprises are looking at aligning their business strategy with the data pool they have gathered. This has led to future-proofing offerings, including responsible AI, that establish trust and are compatible with governance, while scaling AI.

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

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

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

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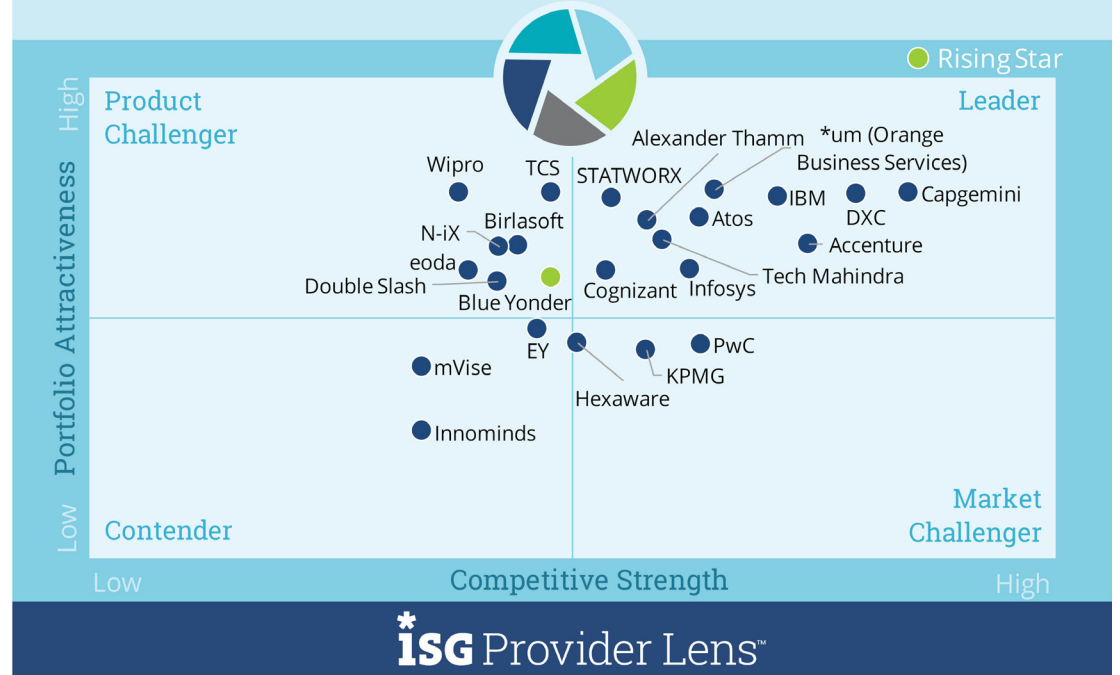
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DATA SCIENCE SERVICES

Definition

The consulting and systems integration service providers surveyed in the this quadrant offer services that use scientific methods, processes, algorithms and systems to derive insights, patterns and conclusions from structured and unstructured data. The goal is to define the right questions and use them to filter out relevant information from a multitude of data streams. Service providers are expected to meet business needs by providing consulting, identifying business applications, developing statistical models and algorithms, modeling, customizing machine learning algorithms and workflows, and providing related support and training services.

Analytics - Services
Data Science Services

2021
Germany

Product Challenger — High — Portfolio Attractiveness — Low — Contender

Leader — Rising Star — Market Challenger

Low — Competitive Strength — High

Providers shown: Alexander Thamm, *um (Orange Business Services), Wipro, TCS, STATWORX, IBM, Capgemini, DXC, Birlasoft, Atos, Accenture, N-iX, eoda, Double Slash, Blue Yonder, Cognizant, Infosys, Tech Mahindra, EY, PwC, KPMG, Hexaware, mVise, Innominds

Source: ISG Research 2021

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DATA SCIENCE SERVICES

Eligibility Criteria

- Offer strategy, vision and consulting

- Demonstrate an approach, methodology and scope of the service portfolio

- Exhibit skills through a sizable pool of data science experts in respective regional markets

- Exhibit technological expertise and competence in independent consulting and selection of solution providers

- Provide immediately available competence centers and data models for industry specific and functional areas

Observations

In the data science services market, only a few providers have significantly changed their position compared to the previous year. This is primarily attributed to the refinement of criteria and a slight change in their weightage (both individual and groups). Thus, providers are improving their positioning not only through sales or employee growth but also through solution concepts, (re)design of their service packages, and appropriate benchmarking.

The effects of the pandemic were also felt in this market category. Thus, projects could not be fully implemented because the closure caused delays. Few providers have addressed pandemic-related issues such as the provision and preparation of data for risk assessment or business forecasting.

Marketing communication often carried out "by experts for experts". Most providers hardly generate any new business outside their target group. This is also an indicator of a mature and divided market.

Prominent trends in this market are the further developments around automated recognition of the meaning of data and the exploitation of previously unused data. Many users are yet to learn the value of data to their business and require supported in this process. Information literacy is one of the buzzwords in this context.

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DATA SCIENCE SERVICES

Observations (con.)

While BI-related analytic applications are often the primary focus of banking and financial services companies and large enterprises, data science is pertinent for organizations in healthcare and life sciences, retail, consumer products and manufacturing. Companies in these sectors have invested heavily in analytical solutions and services and several service providers reported an increase in projects. Many projects involve supply chain or distribution, commodity flow forecasting, commodity pricing, predictive maintenance, maximizing production output, and sales recommendation and segmentation engines among others. These investments help improve both revenue and the bottom line, making these companies more efficient through data-driven insights.

Mature analytics users relied on large data warehouses for their tasks, often many in parallel. In the course of cloudification of their IT landscape, these users want to use the services of IT service providers

for the operation of analytical applications. Users that have only been exposed to analytics recently are seeking practical and functional solutions that do not require them to manage their own data warehouses.

The market maturity is reflected by the high number of companies with a leadership position. Providers should realign their offerings in the coming years.

- ***um** is well known for its methodologies and ability to guide clients from the beginning on the path to advanced data science solutions.

- **Accenture** shines through organic and inorganic growth and continued support for users in digital transformation, with data science being a specialty.

- **Alexander Thamm** has gained leadership in this category for continuously improving its products and services.

- **Atos** is growing both organically and through acquisitions, and is able to consolidate its market position by researching new potential solutions.

- **Capgemini** is an experienced solution and service provider and was one of the first system integrators in Germany to address requirements around big data.

DATA SCIENCE SERVICES

Observations (cont.)

- **Cognizant** has lost some of its assertiveness due to the tightening of the evaluation criteria. It can quickly catch up through targeted activities in Germany.

- **Deloitte** has launched a managed service offering that increases the execution capacity of its data science services.

- **DXC** has overhauled its portfolio technologically and methodologically. It has been developing user-specific solutions with DataOps, DevOps and MLOps, thus consolidating its position in among other leaders in this space.

- **IBM** maintains its leadership in Germany through its innovative strength, future orientation and targeted activities.

- **Infosys** was listed as a Rising Star in last year's survey in the Product Challenger group and has now moved into the Leader's group. This is mainly attributed to two acquisitions in the U.S. which are likely to have global impact.

- **STATWORX** has successfully defended and expanded its leading position in this market category.

- Despite the pandemic, **Tech Mahindra** has lost neither its importance nor reputation in Germany and was thus able to maintain a leading position.

- **Blue Yonder**, a Rising Star, has entered the competition through support from a new parent company. It was among the contenders in the previous year's study.

*UM (ORANGE BUSINESS SERVICES)

Overview

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

Strengths

Data science is *um's "playground": Data science services are the company's domain, offering clients a comprehensive approach to data exploration and analysis.

Ability to deploy deploy cloud-agnostic solutions with hyperscalers in own data centers: With the support of parent company Orange Business Services, *um has partnerships with hyperscalers to strengthen its market position and accelerate project implementation. It also provides training on the use of hyperscaler platforms to provide a comprehensive set of data engineering solutions.

Data thinking instead of design thinking: *um is continuing to excel with its unique application of data thinking. This method, which goes far beyond design thinking, helps users not only to implement analytical applications but also to think fundamentally about the use of existing data. In this way, the data can be applied in completely new contexts for a user company. Data thinking has a foundation in the skills of *um employees and is mostly secure from being copied by other providers. On this basis, the company also offers a portfolio of data science services and helps companies enter this complex field.

Center of excellence as a service: With this new subscription model for the use of *um services, clients can achieve more with their own resources.

Methodology confirmed by references: The references show how large German companies initially develop ideas for a data science project. This means that clients do not have to first define the project framework, identify and prepare data sources or formulate the task.

Caution

With larger projects becoming increasingly resource intensive, *um will have to rely more on the capacities of the parent company. Internal training is also crucial.

2021 ISG Provider Lens™ Leader

*um is one of the leading German technology providers of data science services, enabling clients to gain new insights from their data.

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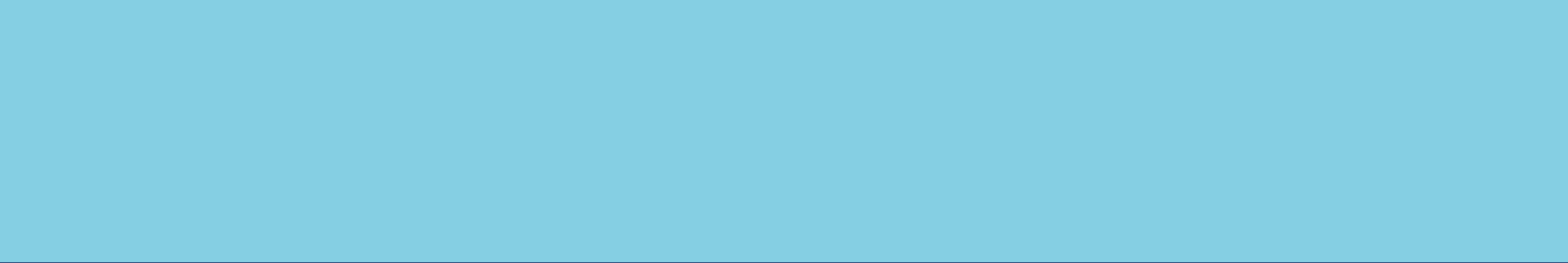
Methodology

METHODOLOGY

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

The study was divided into the following steps:

1. Market definition for Analytics Services

2. Survey among service providers and suppliers on all current topics

3. Interactive discussions with service providers and vendors about their services and use cases

4. Use of ISG's internal databases and the knowledge and experience of ISG's consultants (where possible)

5. Detailed analysis and evaluation of services and corresponding documentation based on data and figures provided by the providers and other sources.

6. Evaluation on the basis of the following criteria
   - Strategy & Vision
   - Innovation
   - Brand Awareness and presence in the market
   - Sales and partner landscape
   - Breadth and Depth of portfolio of services offered
   - Technology Advancements

Authors and Editors

Holm Landrock, Autor
Executive Advisor, ISG Research

At ISG Holm Landrock has built the multi-client studies and vendor benchmarks, now IPLs, and has supported renowned clients – Including internationally leading mobility and financial services providers – with the strategic selection of modern solutions. As an ICT analyst, technical journalist and author of several books, Holm Landrock's core topics include technical-scientific computing, enterprise computing and trend topics such as e-health and quantum computing.

Srujan Akurathi, Enterprise Context and Global Summary Analyst
Senior Analyst

Srujan Akurathi is an analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Networking Services, Microsoft Ecosystem and Data Analytics. His area of expertise lies in SD-WAN, SDN transformation and managed WAN services. Srujan is responsible for developing content from an enterprise perspective and author the global summary report. He also collaborates with advisors and enterprise clients on ad-hoc research assignments and writes articles about niche technologies, market trends and insights.

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Authors and Editors

Jan Erik Aase, Editor
Partner and Global Head – ISG Provider Lens/ISG Research

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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