ISG Provider Lens™

Analytics Services

Data Engineering Services

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

QUADRANT REPORT | DECEMBER 2022 | GERMANY

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

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

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

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

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

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

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

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

Until now, many vendors could rely on customer requests, but the tide has turned. As customer demands decline, service providers are faced with the need to actively approach customers and promote projects and their value. In addition to large accounts, high-end SMEs with 500 to 2,000 employees, in particular, must be addressed in a specific and individual way. Historically, services for analytics generated constant cashflows for IT providers. But with early adopters already catered to and with the ability to run these services themselves, these services have lost their initial demand.

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

Packaging and product maximization are generally good ideas to serve customers with custom-made solutions. Industrialized solutions and approaches are gaining traction worldwide. Service providers are increasingly offering analytical tools and gas pedals based on their extensive industry experience and areas of business expertise.

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

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

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

Considering regional specifics is also extremely important. However, a strong regional organization requires a regional breakdown in service offerings. Particularly in the area of data engineering, providers need to respect the different data characteristics. While in, for example, the U.S. and India, financial data are more common for analytics, in Germany, there's a huge amount of data from engineering or technical-scientific projects which is the target of analytics solutions.

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

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

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

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

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

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

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

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

Local providers are often more engaged than international providers.

Provider Positioning

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

Provider Positioning

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

Provider Positioning

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

Provider Positioning

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

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

Data Engineering Services

Data Science Services

Data Monetization Services

Simplified Illustration Source: ISG 2022

Definition

Analytics is growing in importance, as evident from the significant investments by enterprises on these solutions on their journey toward becoming data-centric entities. Data analytics is becoming integral to the business approaches and digital transformation initiatives of enterprises. ISG analysis indicates a fundamental shift in the mindsets of large enterprises and small and midsized businesses (SMBs) — analytics is no longer about basic business data; analytics solutions are now deployed to derive business value from data. Enterprises wish to address specific business areas such as decision-making, revenue streams, customer experience, operational excellence and optimized business processes. ISG analysis also indicates that while enterprises differ in the level of maturity with their data and analytics practices, they are unanimous in the shift to adopting data-driven processes and embracing a data-centric culture. Compared with 2021, data science services have been witnessing significant changes — veering away from statistical modeling and toward business value and decision intelligence. Providers and enterprises expect data scientists to better understand business context and objectives to enhance insights and thereby enable actionable decision making. While technical skills continue to be a prerequisite to a data scientist's role, business knowledge with domain expertise is increasingly being sought to improve business outcomes. Data engineering services continue to dominate this space with the largest share of revenue and deals, but with a shift from data integration to data fabrics, and adaptive and smart data pipelines. As the focus moves away from simple integration related deals, the productized data engineering market is witnessing an increasing number of service-oriented deals and projects. Data monetization services is a new market segment analyzed in the 2022 edition of this study. It was added because enterprises increasingly require data hubs, data ecosystems and solutions to share data. Data has become key to obtaining multidimensional perspectives across business segments, partners, supply chains, customers and co-innovators.

Scope of the Report

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

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

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

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

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

Provider Classifications

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

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

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

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

The ISG Provider Lens™ quadrants are based on an evaluation matrix and include four fields in which providers are ranked: Leader, Product & Market Challenger and Contender. Each quadrant of an ISG Provider Lens™ study may also include a provider that ISG believes has great potential to achieve a leader position. Such providers may be classified as Rising Star.

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

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Data Engineering Services

Who Should Read This

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

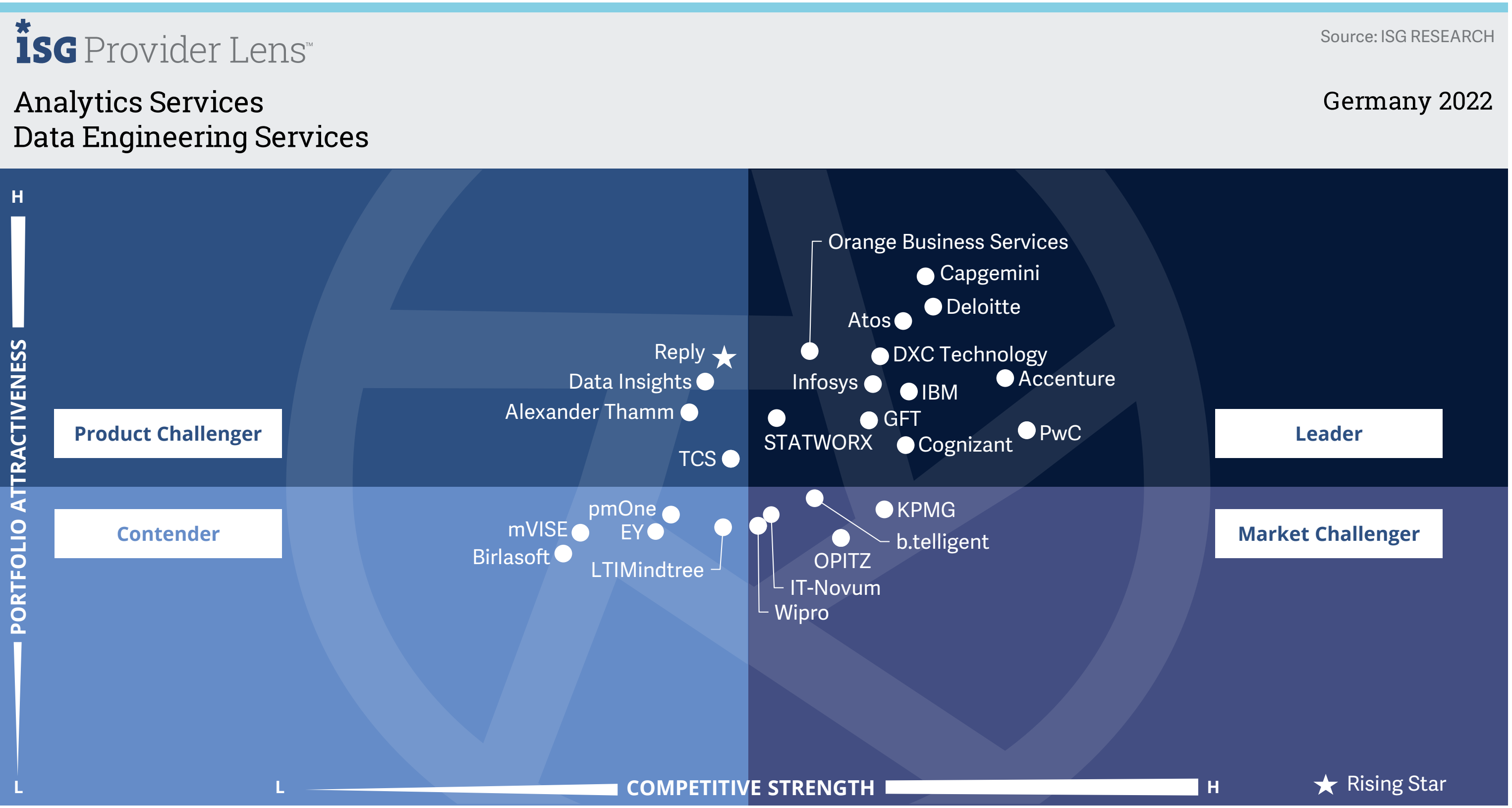
Enterprises are looking at data not just from a numbers perspective but as fuel for the economy and a valuable resource to make business decisions and gain a competitive edge. With massive volumes of data generated from multiple sources in different formats and across the entire value chain in an enterprise, their utilization and consumption have become a key concern. This has led enterprises to invest more in analytical advancements, subsequently elevating the importance of data engineering service providers.

Enterprises in Germany are seeking service providers with a proven track record in managing and curating large data sets comprised of both structured and unstructured data. The ability to implement data lakehouses, data lakes and data fabric to achieve consistency is one of the most sought-after parameters for choosing service providers, in addition to their expertise and experience with data platforms such as Snowflake and Databricks. Enterprises are also considering providers that can address issues related to data security and regulatory compliance.

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

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

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



This quadrant evaluates providers whose services help users collect, prepare and make data available for analytical applications in enterprises. The use of analytics provides **customers with valuable insights into metrics and processes and helps in their digital transformation.**

Holm Landrock

Definition

In this quadrant, service providers in the Data Engineering Services category are evaluated as being able to provide a comprehensive set of services for the collection and aggregation of structured, semi-structured and unstructured data from a range of sources - from text to images and sound to computations. Data is obtained from different systems, processed in context and made available in a structured way according to access parameters. Among other things, service providers offer the development of **data pipelines and data models, the management of file format conversions and the execution of data transformations** - cleansing as well as extraction, transformation and loading (ETL). Managed services are even offered for the provision of applications. In the context of this study, data engineering also includes, among other things, the implementation of data warehouses and data lakes and, in addition, support for the implementation and use of Big Data analysis. Service providers must also be able to develop and implement data governance systems, policies and procedures for effective and efficient data management. Data management service providers are tasked with managing the end-to-end storage, exchange, archiving and retrieval of data within corresponding compliance guidelines. The quadrant includes services to ensure data quality, data security and control, RGPD compliance and data lake creation and management, among others.

Eligibility Criteria

1. **Technology know-how** and **architectural** consulting competence
2. Competence in the **chosen approach and methods** applied, as well as the depth of the service portfolio
3. Competence gained from a **range of data engineering experts** in the relevant regional markets
4. Proven **technology expertise, business knowledge and professional** competence with independent advice and solution provider options
5. Provision of **standardized/ customized frameworks and platforms** for data aggregation and cleansing
6. Experience in **setting up data hubs, data fabrics, modular data** lakes, multi-cloud data integration services and access to partner data ecosystems.
7. **Support and training** services that, ideally, can be purchased as independent offerings, separate from other service contracts

Observations

Exciting developments are happening in the data engineering space. The big players in the market can be divided into two groups. On the one hand, there are players that are engaged in activities such as carrying out major spin-offs and restructuring measures. During this period, only the large customers with advantageous contracts are still holding the line. There is not enough strength and time for new, well-known customers. On the other hand, the other group of players has integrated their recent acquisitions and is offering new services and support to users.

An intensive data analysis capability is a prerequisite to the creation of information from data. Providers often use the concept of data modernization in the context of data engineering, which was introduced a few years ago. In other words, many providers offer not only their data engineering services but also their data science and data monetization services to customers as part of the enterprise mission to move the existing data from legacy applications to modern cloud-based platforms.

Many companies want to improve the determination of their KPIs and optimize their business processes with the help of data engineering. However, the market for advanced analytics services and solutions has recorded a slight decline as many users have postponed their IT investments due to the current crisis in Europe. Owing to this reluctance, the companies evaluated here must be considered particularly successful.

Of the 26 companies evaluated in this market segment, 12 have qualified as Leaders. Reply was voted as a Rising Star.

Accenture re-confirms its delivery strength. In the past few months, the company has made numerous acquisitions worldwide, including in Germany. With its technology consulting and IT services, Accenture addresses large accounts that need Big Data analysis. It manages to combine size and versatility.

Atos is one of the few providers that can bring a portfolio of hardware in addition to solutions and services to the table; this ensures its position in the Leader quadrant. One of the areas is the aggregation of business data for a better analysis of customer KPIs. Its partnerships with providers such as SAP or Hitachi Vantara ensure a comprehensive portfolio of data engineering services.

Capgemini was able to achieve its ambitious goals for 2022, including the recruitment of a large number of employees. Its IDEA platform is increasingly becoming a central element of its data engineering solutions. The adoption of concepts such as data hubs is also more visible at Capgemini than most of its competitors.

Cognizant offers a wide range of enterprise services and applications that support clients on their digital journey with analytics applications. Three of Cognizant's six largest customers are global companies based in Germany.

Deloitte

Deloitte combines business consulting with an aim to improve key figures with analytical processes. The company's data engineering capabilities also ensure that business decisions are increasingly driven by data.

DXC Technology

DXC Technology asserts itself as a Leader in this study owing to its strong client base, service and support portfolio and brand image. The design thinking culture plays an important role, supporting the strong evaluation of the design criteria.

GFT

GFT focuses on selected sectors, and its growth in recent years confirms the success of this approach. The company is, thus, able to build on the expertise it has acquired in advising its clients over many years. GFT's global presence is also growing.

IBM

This year, **IBM** had to deal with the consequences of the Kyndryl spin-off and is now (re)transforming itself into a technology-driven IT provider, with software being the centerpiece of the balance. In the field of data engineering, many users are still using the older IBM solutions; the pressure to renew them is growing.

Infosys

Infosys is a software and service provider of data engineering services that is successful in all regions; Germany is also a strong market for the company. The idea of a shop floor extension for data operations is one of the success factors of the Infosys strategy.

Orange Business Services

Orange Business Services is an IT service provider that, thanks to the full integration of acquisitions in recent years, has the data engineering expertise that customers demand today. Customers that demand end-to-end solutions benefit from this combination from a single provider.

PwC

With its portfolio of services and solutions for predictive analytics, AI and NLP, **PwC** reaches out to companies that would not be able to make progress with off-the-shelf solutions. Use cases, which describe the path to data engineering in blueprints or playbooks, help users implement even demanding analytics environments.

statworx

statworx is one of the few German companies in this study and is exceptionally successful, not only in relation to its size but in other parameters as well. Good connections with academic institutions give the company an edge over others in the war for talent. statworx scores with its data science know-how and data literacy services, even with large companies.

Reply

Reply qualified as a Rising Star in this study owing to its commitment to the region, its technologies as well as user confidence. By continuing to grow and increasing its visibility outside its core target group, the company has a chance to be a Leader in the upcoming studies.

Orange Business Service

Leader

"Orange Business Services is a Leader owing to its exceptional skills in the integration of data engineering."

Holm Landrock

Overview

Orange Business Services is based in Paris and operates in 55 countries. It has 28,500 employees in about 100 subsidiaries and generated a revenue of $9.5 billion in FY20; a major share of this can be attributed to its IT services. In Germany, the company's service offering in the field of data engineering includes mainly ideas and solutions of fully integrated The unbelievable Machine Company.

Strengths

Comprehensive IT services along with data engineering expertise: Orange Business Services (Orange) combines the strengths of a European IT services company with the specific expertise of the fully integrated The unbelievable Machine Company. Customers benefit from data engineering and high-performance IT services from a single source. The portfolio has been fundamentally redesigned and is now well-sorted and available to customers.

Data thinking as the foundation for cloud-agnostic projects: Customers are supported where their needs are greatest. Knowledge transfer is the focus. Data literacy programs provide training to customers. In addition to the hyperscalers' platforms, new partnerships, such as with Databricks, or open-source solutions with Kafka are used for this purpose.

Well-documented attractive reference projects: One of the company's highlight projects was that of the Data-in-Action team helping users to merge historical data. Orange Business Services offered an end-to-end methodology for data mining and analysis for this project.

Caution

The company's rebranding has mobilized a lot of resources over the past 12 months. Orange Business Services now needs to bring its cloud and data strategy to life.

External source integration skills could further enhance the service portfolio.

Data engineering services are still only a small part of Orange Business Services' overall portfolio; they could be further emphasized as the company's USP.

Appendix

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

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The research and analysis presented in this report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of October 2022, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

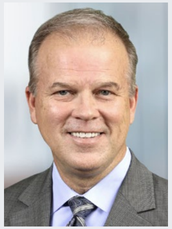
1. Definition of Analytics Service Providers market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Distinguished Lead Analyst

Holm Landrock
Senior Advisor

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

At ISG Holm Landrock has built the multi-client studies and vendor benchmarks, now IPL studies, and has supported renowned clients – Including internationally leading mobility and financial services providers – with the strategic selection of modern solutions in order to support the client's digital transformation. He supports both user clients and ICT providers.



IPL Product Owner

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

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

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

ISG Provider Lens™

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

For more information about ISG Provider Lens research, please visit this webpage.

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