

***ISG** Provider Lens™

Data Analytics Services & Solutions

Data Engineering Services

Germany 2019/2020

Quadrant Report



A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:



June 2019

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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 was current as of 31.01.2019. ISG recognizes that many mergers and acquisitions have taken place since that time but those changes are not reflected in this report.

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ISG Provider Lens™

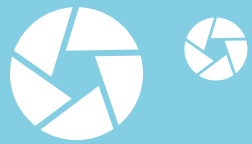
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EXECUTIVE SUMMARY

For a lot of companies, Data Analytics is becoming the key competitive factor.

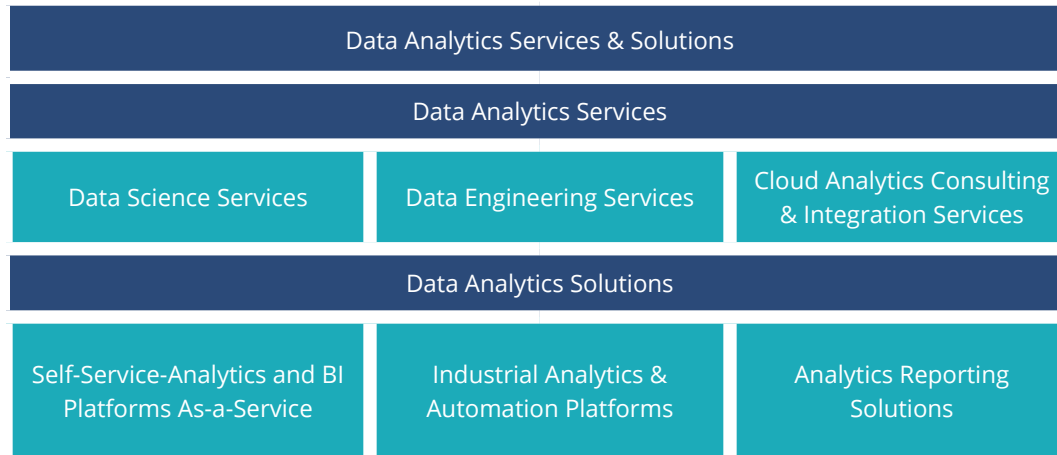
Digitization is changing the competitive landscape in many segments. Traditional physical capital such as plants or buildings is losing considerably in weight compared to digital assets, particularly, the possession of valuable data and the ability to use it for gaining a competitive advantage based on knowledge. Amazon is valued almost twice as highly as Walmart in the capital market, although Walmart still generates twice as much revenue. Companies need to generate and process data more intelligently in order to stay relevant to their customers, employees and stakeholders. Therefore, many invest in the capture and usage of a wide range of data in order to develop and constantly adapt their planning and their vision of the future. An underlying strategy for applying data-driven decisions is as important as the right tools or trending data-science platforms. The exponential growth of the data volume calls for transformation, modelling and analysis, including visualization of structured as well as unstructured data from internal and increasingly external sources. For this purpose, more and more companies are using computer-based automation of defined processes and pattern recognition.

Changes in the IT landscape due to Enterprise Mobility and the arrival of the Public Cloud are leading to profound changes in data-processing. The rising volume of unstructured data from multiple sources must be captured, stored, processed and analysed in line with increasingly stringent data-security laws. As a result, disciplines like Data Engineering for defining the underlying IT infrastructure to sustain a data management architecture and Data Science, the use of scientific methods for data-processing, were created. One of the design intentions is that systems will adjust themselves in future, within the framework of modern development platforms. Users will increasingly be able to access modern and SaaS-based applications as well as user friendly Analytics and Monitoring tools. An interface, which can be easily used by experts without additional programming, is a vital ingredient today.

Therefore, the actual study analyses a mix of different topics under Data Analytics. A key focus has been placed on professional services as well as on products or as-a-Service-Offerings. This year, ISG has identified the following market segments:

Introduction

Simplified illustration



Source: ISG 2019

Definition

Digital business models are supported by Data Analytics. Expert decision-makers are increasingly demanding complex data-analysis capabilities in order to take informed decisions. The volume of available but unstructured data is rising exponentially because of IoT and social media. Therefore, a highly scalable and flexible data infrastructure needs to be created, as a base to enable high quality correlations and relevant analytics to be performed. Data Science is a scientific discipline applied to data analysis, encompassing Machine Learning, Deep Learning systems and neural networks.

Definition (cont.)

Scope of the Study

In order to stay relevant in future, companies need to build and implement their own Data Analytics strategy. They need to bring the right partners on board for that. This report provides guidance through the provider landscape in the six markets defined in the previous chapter.



Provider Classifications

The research quadrants of the ISG Provider Lens™ are based on an evaluation matrix. The individual providers have been categorized in four distinct sections based on the results of the analysis.

Leader

The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

Market Challenger

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders.” Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

Contender

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ Quadrant may show providers with a strong potential for promotion to the Leader quadrants, according to ISG.

Rising Star

Rising stars are mostly product challengers with high future potential. When receiving the “rising stars” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “rising stars” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.

Data Analytics Services & Solutions - Quadrant Provider Listing 1 of 6

	Self-Service Analytics and BI Platforms As-a-Service	Industrial Analytics & Automation Platforms	Analytics Reporting Solutions	Data Science Services	Data Engineering Services	Cloud Analytics Consulting & Integration Services
*um (Orange Business Services)	● Not In	● Not In	● Not In	● Leader	● Leader	● Product Challenger
1010data	● Not In	● Not In	● Product Challenger	● Not In	● Not In	● Not In
ABB	● Not In	● Product Challenger	● Not In	● Not In	● Not In	● Not In
Accenture	● Not In	● Not In	● Not In	● Leader	● Market Challenger	● Leader
Alexander Thamm	● Not In	● Not In	● Not In	● Leader	● Leader	● Rising Star
All for one	● Not In	● Not In	● Not In	● Not In	● Contender	● Product Challenger
Allgeier	● Not In	● Not In	● Not In	● Not In	● Contender	● Product Challenger
AlterSolutions	● Not In	● Not In	● Not In	● Not In	● Contender	● Not In
Alteryx	● Contender	● Not In	● Not In	● Not In	● Not In	● Not In
Altizon	● Not In	● Contender	● Not In	● Not In	● Not In	● Not In
Atos	● Not In	● Product Challenger	● Not In	● Leader	● Leader	● Leader
Avantgarde Labs	● Not In	● Not In	● Not In	● Not In	● Not In	● Contender
AWS	● Product Challenger	● Not In	● Not In	● Not In	● Not In	● Not In

Data Analytics Services & Solutions - Quadrant Provider Listing 2 of 6

	Self-Service Analytics and BI Platforms As-a-Service	Industrial Analytics & Automation Platforms	Analytics Reporting Solutions	Data Science Services	Data Engineering Services	Cloud Analytics Consulting & Integration Services
Axians	● Not In	● Contender	● Not In	● Not In	● Not In	● Not In
BEDM	● Not In	● Market Challenger	● Not In	● Not In	● Not In	● Not In
Birlasoft	● Not In	● Contender	● Contender	● Not In	● Not In	● Not In
Birst	● Not In	● Not In	● Product Challenger	● Not In	● Not In	● Not In
Blue Yonder (JDA)	● Not In	● Not In	● Not In	● Contender	● Not In	● Not In
Board International	● Contender	● Not In	● Not In	● Not In	● Not In	● Not In
Bosch	● Not In	● Leader	● Leader	● Not In	● Not In	● Not In
Buxtonco	● Not In	● Not In	● Product Challenger	● Not In	● Not In	● Not In
Capgemini	● Not In	● Not In	● Not In	● Leader	● Leader	● Leader
CGI	● Not In	● Not In	● Not In	● Not In	● Not In	● Product Challenger
Cognizant	● Not In	● Not In	● Not In	● Not In	● Contender	● Market Challenger
Cubeware	● Not In	● Not In	● Product Challenger	● Not In	● Not In	● Not In
Datameer	● Contender	● Not In	● Not In	● Not In	● Not In	● Not In

Data Analytics Services & Solutions - Quadrant Provider Listing 3 of 6

	Self-Service Analytics and BI Platforms As-a-Service	Industrial Analytics & Automation Platforms	Analytics Reporting Solutions	Data Science Services	Data Engineering Services	Cloud Analytics Consulting & Integration Services
datapine	● Leader	● Not In	● Not In	● Not In	● Not In	● Not In
Datawatch	● Product Challenger	● Not In	● Not In	● Not In	● Not In	● Not In
Deloitte	● Not In	● Not In	● Not In	● Leader	● Product Challenger	● Contender
Device Insight	● Not In	● Leader	● Not In	● Not In	● Not In	● Not In
doubleSlash	● Not In	● Not In	● Not In	● Product Challenger	● Not In	● Contender
DXC Technology	● Not In	● Not In	● Not In	● Leader	● Leader	● Leader
Empolis	● Not In	● Not In	● Leader	● Not In	● Not In	● Not In
eoda	● Rising Star	● Leader	● Not In	● Contender	● Not In	● Not In
Ernst & Young	● Not In	● Not In	● Not In	● Market Challenger	● Product Challenger	● Not In
FIT	● Not In	● Contender	● Not In	● Not In	● Not In	● Not In
FORCAM	● Market Challenger	● Leader	● Market Challenger	● Not In	● Not In	● Not In
Gefasoft	● Not In	● Market Challenger	● Not In	● Not In	● Not In	● Not In
Google	● Market Challenger	● Not In	● Not In	● Not In	● Not In	● Not In

Data Analytics Services & Solutions - Quadrant Provider Listing 4 of 6

	Self-Service Analytics and BI Platforms As-a-Service	Industrial Analytics & Automation Platforms	Analytics Reporting Solutions	Data Science Services	Data Engineering Services	Cloud Analytics Consulting & Integration Services
HCL	● Not In	● Not In	● Not In	● Not In	● Not In	● Market Challenger
IBM	● Leader	● Not In	● Leader	● Leader	● Leader	● Leader
Information builders	● Contender	● Not In	● Not In	● Not In	● Not In	● Not In
Infosys	● Not In	● Not In	● Not In	● Not In	Leader	● Leader
iTAC Software	● Not In	● Leader	● Contender	● Not In	● Not In	● Not In
iTizzimo	● Not In	● Not In	● Contender	● Not In	● Not In	● Not In
KPMG	● Not In	● Not In	● Not In	● Market Challenger	● Market Challenger	● Contender
Maiborn Wolff	● Not In	● Not In	● Not In	● Product Challenger	● Not In	● Not In
Merantix	● Not In	● Not In	● Not In	● Product Challenger	● Not In	● Not In
Microsoft	● Leader	● Not In	● Not In	● Not In	● Not In	● Not In
MicroStrategy	● Product Challenger	● Not In	● Not In	● Not In	● Not In	● Not In
Mindtree	● Not In	● Not In	● Not In	● Not In	● Contender	● Contender
mVISE	● Not In	● Not In	● Not In	● Contender	● Rising Star	● Not In

Data Analytics Services & Solutions - Quadrant Provider Listing 5 of 6

	Self-Service Analytics and BI Platforms As-a-Service	Industrial Analytics & Automation Platforms	Analytics Reporting Solutions	Data Science Services	Data Engineering Services	Cloud Analytics Consulting & Integration Services
Nemetriz	● Not In	● Leader	● Market Challenger	● Not In	● Not In	● Not In
NTT DATA	● Not In	● Not In	● Not In	● Not In	● Product Challenger	● Product Challenger
pmOne	● Market Challenger	● Not In	● Not In	● Not In	● Not In	● Not In
PTC	● Not In	● Not In	● Leader	● Not In	● Not In	● Not In
PwC	● Not In	● Not In	● Not In	● Market Challenger	● Not In	● Contender
Qlik	● Leader	● Product Challenger	● Leader	● Not In	● Not In	● Not In
Relayr	● Not In	● Rising Star	● Not In	● Not In	● Not In	● Not In
Reply	● Not In	● Not In	● Product Challenger	● Not In	● Not In	● Not In
Rockwell Automation	● Not In	● Market Challenger	● Not In	● Not In	● Not In	● Not In
SAP	● Leader	● Leader	● Leader	● Not In	● Not In	● Not In
SAS	● Leader	● Not In	● Not In	● Not In	● Not In	● Not In
Schneider Electric	● Not In	● Product Challenger	● Not In	● Not In	● Not In	● Not In
Siemens	● Not In	● Leader	● Not In	● Not In	● Not In	● Not In

Data Analytics Services & Solutions - Quadrant Provider Listing 6 of 6

	Self-Service Analytics and BI Platforms As-a-Service	Industrial Analytics & Automation Platforms	Analytics Reporting Solutions	Data Science Services	Data Engineering Services	Cloud Analytics Consulting & Integration Services
Sisense	● Product Challenger	● Not In	● Not In	● Not In	● Not In	● Not In
Software AG	● Not In	● Not In	● Market Challenger	● Not In	● Not In	● Not In
Solita	● Not In	● Not In	● Not In	● Contender	● Not In	● Not In
Splunk	● Not In	● Not In	● Leader	● Not In	● Not In	● Not In
STATWORX	● Not In	● Not In	● Not In	● Rising Star	● Not In	● Not In
Tableau	● Leader	● Not In	● Leader	● Not In	● Not In	● Not In
Talend	● Not In	● Not In	● Not In	● Product Challenger	● Not In	● Not In
TCS	● Not In	● Not In	● Not In	● Not In	● Product Challenger	● Market Challenger
TechMahindra	● Not In	● Not In	● Not In	● Not In	● Product Challenger	● Market Challenger
Teradata	● Product Challenger	● Not In	● Not In	● Market Challenger	● Not In	● Not In
TIBCO	● Leader	● Not In	● Market Challenger	● Not In	● Not In	● Not In
Wipro	● Not In	● Not In	● Not In	● Not In	● Product Challenger	● Market Challenger
Woodmark	● Not In	● Not In	● Not In	● Product Challenger	● Not In	● Contender



Data Analytics Services & Solutions Quadrants

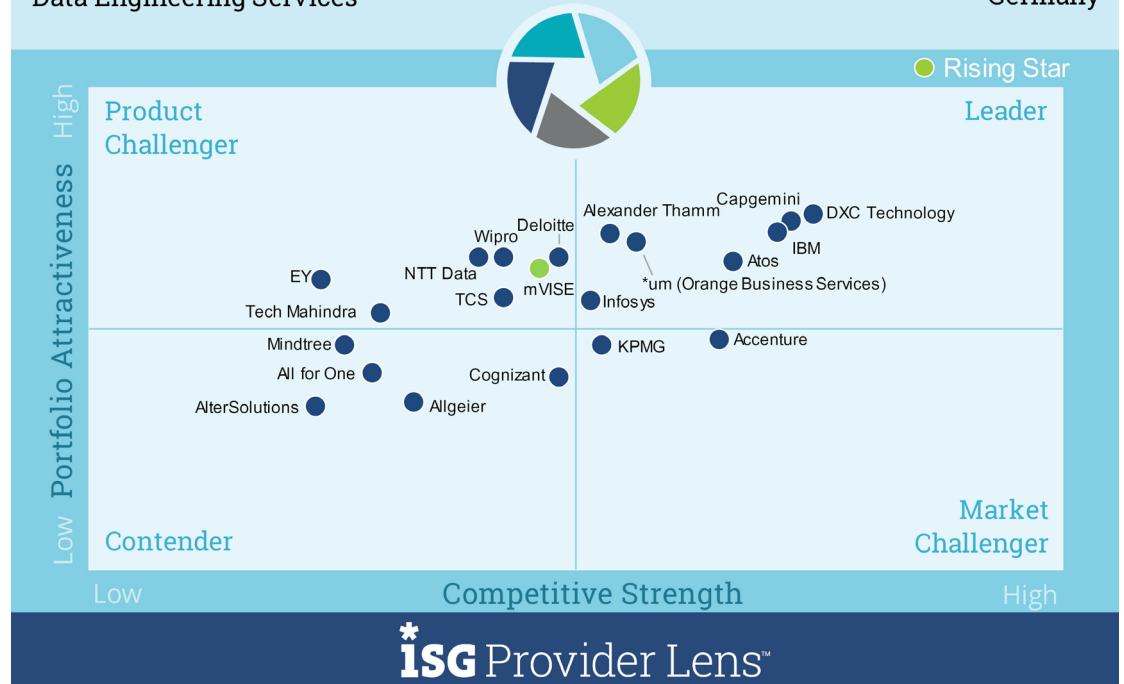
DATA ENGINEERING SERVICES

Definition

Data Engineering Services are services which involve the collection and aggregation of data from structured, semi-structured and unstructured sources. Data is obtained from different systems, processed in context and is made available in a structured manner as per access settings.

Data Analytics Services & Solutions
Data Engineering Services

2019/2020
Germany



Source: ISG Research 2019

DATA ENGINEERING SERVICES

Eligibility Criteria

- Technology know-how and architectural consulting
- Approach taken, methods applied and the depth of the service portfolio
- Competence and the number of Data Engineering experts in the German market
- Ability for independent consultation and choice of solution providers

Observations

Data Engineering or the renewal of system architecture for collection, storage and processing of data is gaining in importance. The optimization of data architecture is a key issue for many software developers as the enormous rise in data volume is burdening the classical data-warehousing structures beyond their capacity. The transformation to public cloud requires new ways of managing and processing. Companies are increasingly collecting large volumes of unstructured data through social-media interactions with customers, interest groups and derived from IoT sensors. While the business planners are trying to find its best use, the data is stored in a virtual repository, a data lake.

Those in charge of data analytics are implementing Data Engineering in order to ensure that their IT infrastructure is able to keep pace with these developments. The infrastructure should be scalable in order to manage huge volumes of data being collected from varied sources. At the same time, it should have the flexibility to provide access to users spread across widely distributed locations and a variety of receiving devices, from the tablet to the monitoring console in the factory.

DATA ENGINEERING SERVICES

Observations (cont.)

- With “Codex”, **Atos** offers its own managed analytics platform for processing, analysing and representing data from varied sources. It is a high-performance resource based on Atos own hardware products which enables even hybrid scenarios.
- **Alexander Thamm** stands out for its broad portfolio which supports customers in their “data journey” in data analytics and AI projects in a structured and targeted manner. Apart from that, even non-technical aspects, which are significant for the success of the project, are adequately addressed.
- **Capgemini’s** Data Engineering team is big as well as competent and experienced in the application of the latest analytical tools. Extensive customer references reinforce the high degree of trust shown in the provider set against a highly competitive and dynamic Data Engineering market.
- **dxc Technology** offers its comprehensive Data Engineering platform as an end-to-end solution and thereby covers many industrial

segments. It establishes a high implementation expertise with its large number of data engineers. This makes DXC a prominent provider in the field of Data Engineering services.

- **IBM** effectively helps customers in their journey to data and knowledge-based companies, with its own “Hybrid Data Management” platform and other in-house methods. It ranks among the leading providers in the German market owing to its comprehensive offerings, its size and its extensive expertise.
- **Infosys** is driving its Data Engineering services at a rapid pace and in a targeted manner in the German market and has gained high momentum through investments and acquisitions.
- ***um (Orange Business Services)** has increased its reach and scope through its acquisition by Baseform and Orange Business Services. It has won prominent reference customers for developing and operating large data lakes.
- **mVISE** (Rising Star) has its own data-integration platform apart from consulting know-how and analytics services and can rely on decades of experience. The company, with its approx.160 employees, leads its customers in a target-oriented manner and across all process stages to project success.

ATOS

Overview

With "Codex", Atos offers its own managed analytics platform for processing, analysing and representing data from varied sources.

Strengths

Atos has a competitive edge through its own high-performance resources: Atos has high-performance resources in form of its HPC products based on its own Bull Sequan super-computer-series enabling hybrid scenarios.

Atos provides integration services for a wide array of data sources: The provider has integrated IoT and GIS Analytics.

Atos has a strong sector focus: Atos demonstrates its strong position, especially in manufacturing, life sciences and public sector, with numerous project examples. In addition, the provider has developed a prominent presence in the financial sector with the acquisition of Syntel.

Caution

Atos does not cover some of the sectors well enough: Atos should engage with sectors such as health and energy more intensively to play a bigger role in these rising markets in future.

The in-house resources can be developed further: An in-house trainee program can counter skills shortage



2019 ISG Provider Lens™ Leader

Atosis a strong player in the German market combining extensive expertise and a large number of highly skilled experts.

ALEXANDER THAMM

Overview

Alexander Thamm GmbH is a Data Science specialist and a consulting firm for Data Analytics and Artificial Intelligence projects.

Strengths

Alexander Thamm has a comprehensive portfolio: Alexander Thamm offers a comprehensive portfolio grouped in a “Data Journey” consisting of 9 stages. It includes consulting, projects and an academy for education and training in Data Science.

Customers benefit from the constant optimization of services: The expansion of its portfolio to platform-based products, such as with open-source technology, is highly promising and can help attract new target groups, for example in medium-sized enterprises. Mercury ML is one of the first products to be based on open-source technology.

Extensive use-cases demonstrate the range of offerings: It has numerous project references and use-cases which range from automotive to energy and retail- the span is very extensive It plans to enter other industry segments such as chemical and pharmaceutical sectors.

It is increasingly assisting customers with decision-making on the organizational structure: Alexander Thamm addresses technical aspects in the same measure as governance, change-management and (cyber) security.

Caution

The company needs to become more professional as a bigger organization: The strong growth entails new challenges for the Data Science experts, organizational, personal and cultural, which Alexander Thamm needs to address. This includes acquiring new target markets and regions as well as the efforts to become more competitive through inorganic growth.

Alexander Thamm could professionalize its market-image: Marketing initiatives should be enhanced, matching the already achieved market position, proven in numerous projects.



2019 ISG Provider Lens™ Leader

Alexander Thamm GmbH is a dynamic and innovative expert for Data Analytics and Artificial Intelligence projects and is hence a partner in the complete digital transformation of companies.

CAPGEMINI

Overview

Capgemini offers a comprehensive Data Analytics framework which covers all topics, from different platforms to data sources, analysis and implementation to data governance, strategy and processes.

Strengths

Capgemini has extensive customer references: Capgemini can produce numerous extensive customer references in practically all economic sectors, thereby demonstrating the great trust shown by its customers.

Capgemini has highly skilled experts in the team: The Data Engineering team is huge, staffed with high-level experts and familiar with all the common and latest analytical tools.

Capgemini has a sophisticated portfolio which covers all possible customer needs: Capgemini offers a comprehensive and well-structured portfolio which covers almost all customer requirements.

Caution

Capgemini has not developed similar integration expertise for the Google Hyperscaler as it has for the leading competitors AWS and Azure. With regards to the focussed market presence of Google, Capgemini needs to catch up.



2019 ISG Provider Lens™ Leader

Capgemini offers powerful Data Engineering integration services, delivered by highly skilled resources.

DXC TECHNOLOGY

Overview

dxc Technology is a leading IT provider for Data Engineering and platforms. The company focuses on Data Analytics and AI development services as well as accelerators which are available as micro services.

Strengths

DXC offers a well-structured solution: The Data Engineering and platform offering covers Analytics modernization & migration factory, Data Engineering and utilities and offers the customer a well-structured end-to-end solution for collecting and aggregating data.

DXC has considerable expertise: DXC has strong implementation skills accompanied by business consulting expertise owing to a large number of highly skilled data engineers and other experts, some of them with decades of experience and expertise.

DXC's offering relies on an extremely flexible infrastructure: DXC offers all kinds of scenarios, from on-premise to Hybrid and Cloud.

DXC covers a wide range of sectors: DXC has a prominent position in key industries in Germany: automotive, energy, manufacturing, pharmaceutical, retail, finance and public sector. More than 500 use-cases in more than 10 industries demonstrate the sector coverage.

Caution

DXC follows a very selective brand strategy: Some companies, which have just included Data Engineering in their agenda, could miss it while shortlisting providers.

DXC could market its strengths in the field of innovation better: The collaboration with scientific networks and association with start-ups is exemplary and should be continued in the long-term, with a view to enhance its capability and visibility in the field of innovation.



2019 ISG Provider Lens™ Leader

DXC Technology attracts customers with a comprehensive and in-depth expertise in Data Engineering and is an ideal partner, especially for global companies.

IBM

 Overview

IBM is a renowned global provider with extensive experience in Data Engineering.

 Strengths

IBM has a market-oriented comprehensive portfolio: IBM offers a comprehensive, solution-based end-to-end service portfolio for on-premise, cloud and hybrid implementations. IBM Hybrid Data Management Platform helps aggregate all forms of data from diverse sources.

Customers benefit from the in-house methods: IBM has developed its own methods, for example, the IBM Data First Method, which systematically guides customers on the way to become a data and knowledge-based company. The focus is strongly on specific business requirements, from which the corresponding next steps for IT and data strategy can be logically derived.

Extensive references and use-cases: The provider can convincingly demonstrate extensive use-cases and customer examples across sectors. Due to the considerable market share of SPSS as well the marketing of cognitive computing via Watson, IBM is well-placed for addressing complex customer needs.

 Caution

IBM has a strong focus on its in-house product or analytics software portfolio: The strong interconnection between the technology offering and services hampers its position as an independent service provider. IBM should become more open to products from competitors as a data basis and incorporate them, when required.

The value-proposition should be emphasized more clearly: The scope and complexity of IBM's offering can quickly overwhelm customers, especially small and mid-size companies.



2019 ISG Provider Lens™ Leader

IBM's offering and its extensive expertise make it one of the leading providers in Data Engineering in the German market.

INFOSYS

Overview

Infosys expands its Data Engineering services at a fast pace and is strengthening its implementation capabilities in the German market.

Strengths

Infosys has a comprehensive data engineering portfolio: Infosys offers a comprehensive and complete portfolio along the value chain for data analytics. It includes data collection strategies and roadmaps for big data and the cloud, data consulting, architecture strategies, data management, advanced analytics strategies and governance.

Infosys improves its offering through significant investments: Infosys has invested in data analytics product vendors such as Trifacta and Waterline Data to improve its platforms. This enables comprehensive management of programming interfaces to data sources.

Infosys has its own open source data analytics platform, the Infosys Industry Platform, for which it also offers professional services. It provides modern data analytics functions with AI and ML and is compatible with market-leading cloud platforms.

Infosys offers a free trial period for services: As one of the few leaders in this research, Infosys offers a four-week free POC for IP-based solutions as well as a free data engineering case study for existing and potential customers to demonstrate the value of the services to the customer.

Caution

Infosys focuses primarily on major international customers who are also based in Germany: The local adaption of the portfolio and delivery resources must be further strengthened to improve the positioning for customers with headquarters in Germany.



2019 ISG Provider Lens™ Leader

Infosys has an extensive portfolio with a large number of experts who are available to customers in the local business center.

*UM (ORANGE BUSINESS SERVICES)

Overview

*um(unbelievable machines)is one of the leading full-service providers in Data Analytics in Germany. The company has undergone a double acquisition. It was first acquired by Basefarm in northern Europe in order to build its services unit for addressing companies in Germany. In 2018, Basefarm was acquired by Orange Business Services, one of the biggest European telecommunications providers.

Strengths

***um offers an extensive service portfolio:** The portfolio includes architecture, development and operation of data-lakes in order to store, process and roll out data for NoSQL technologies like Hadoop, Cassandra etc. For this purpose, the Data Science team works closely with engineers for the development of software solutions.

The company can present notable references: *um can refer to high-profile reference customers from DAX companies for the development and operation of data lakes, some of them globally, on the AWS and Azure platforms, among others.

***um has gained an extensive European coverage for global customers through its acquisition:** As part of Orange Business Services, the company has a larger scope in Europe and access to cloud, AI and data experts.

Caution

The company is not marketing its expertise well-enough through good use-cases: It has extensive expertise from numerous customer projects in different sectors. This could and should be utilized to drive further development and to create sector specific use-cases.



2019 ISG Provider Lens™ Leader

*um (Orange Business Services) is a leading IT services provider with its roots in Cloud business and a keen sense for information-based business prospects.

RISING STAR: MVICE

Overview

mVISE AG, headquartered in Düsseldorf has approx. 160 technology-focused employees and develops solutions for an agile, secure and flexible IT. The services portfolio includes customized software, apart from technology consulting.

Strengths

A one-stop shop: With its extensive consulting know-how for Big Data, customer analytics and analytics services as well as its in-house data integration platform, the company can provide expert assistance to its customers in their data projects and can support them right from the definition of the target architecture and implementation plans through to going live.

Extensive experience: In more than 15 years, mVISE has developed great expertise in the end-to-end development of data integration and analytical platforms, whereby elastic.io, as a hybrid iPaaS platform, promises a significant acceleration of integration tasks.

Comprehensive support for building data warehouses: mVISE supports its customers in all process stages in Data Engineering, from needs assessment and technical conception to operation. This service ensures the development of a seamless database which generates comprehensive insights.

Caution

More focused presentation of use-cases is needed: The publicly available use-cases for Analytics services on its website should be presented in a more detailed and concrete manner. In order to effectively demonstrate its expertise, concrete customer examples should feature more prominently.

Further integration of its business units is advisable: With a view to further organizational growth and improvement of margins, a tighter integration between the IT consulting services and products should be promoted.



2019 ISG Provider Lens™ Rising Star

mVISE offers a comprehensive portfolio, from client requirement assessment and implementation to operation. Numerous experts ensure best possible consulting and high efficiency.



Methodology

METHODOLOGY

The ISG Provider Lens™ 2019 – Data Analytics Services & Solutions research study analyses the relevant software vendors and service providers in the Germany market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Data Analytics Services & Solutions
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. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
6. Use of the following key evaluation 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



Dr. Henning Dransfeld, Author

Principal, Research

Mr. Dransfeld is a thought leader regularly publishing on trends related to the mobile enterprise, the digital workspace and IoT markets. As an analyst, ICT strategist and go-to market expert he has developed deep insights into portfolio development and changing customer requirements. Through his experience as analyst and marketing strategist, he is in a strong position to support the definition and execution of go-to-market strategies for ICT services.

Henning is a known expert in the evaluation of supplier strategies, competitive landscapes and differentiation with over 20 years of experience in the ICT sector. In addition, Henning advises providers on key messages in marketing and sales communications. In the context of in-depth market analyses on the German supply side through vendor benchmarks, he derives sustainable strategies for the digital transformation. Henning is an experienced trilingual speaker on international conferences.

Henning holds a Ph.D. from the University of Wales, Swansea College in management science and wrote his theses on “Interactive TV and its potential for retailing in the luxury car industry”; he also holds a Diplôme d’Etudes Supérieures Spécialisées on international management from the Université de Rennes and a diploma in strategic Marketing from Henley Management College.

Authors and Editors



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Junior Consultant, Research

Mr. Nolte is a Junior Consultant, Research, at ISG. Mr. Nolte is in charge of global project management for individual ISG Provider Lens™ studies and supports the research department accordingly. His focus is on data analytics and social business.

Prior to joining ISG as a Junior Consultant, Research, Mr. Nolte was a working student for Experton Group AG for three years, while completing his M.Sc. Business studies with a focus on dialog marketing at the University of Kassel. Before, he completed his studies as a B.A. in economics with a focus on financial management and marketing at the University of Kassel. For his master's thesis Mr. Nolte researched the topic of trend monitoring approaches and requirements on Twitter. Besides his work for Experton Group AG, Mr. Nolte also completed an internship at TNS Infratest in Munich, where he gained financial market research experience.

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