iSG Provider Lens™

Data Analytics Services & Solutions

Data Science Services

Germany 2019/2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

June 2019

About 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 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.

The authors of this report are Dr. Henning Dransfeld and Steffen Nolte.

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ISG Provider Lens™

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EXECUTIVE SUMMARY

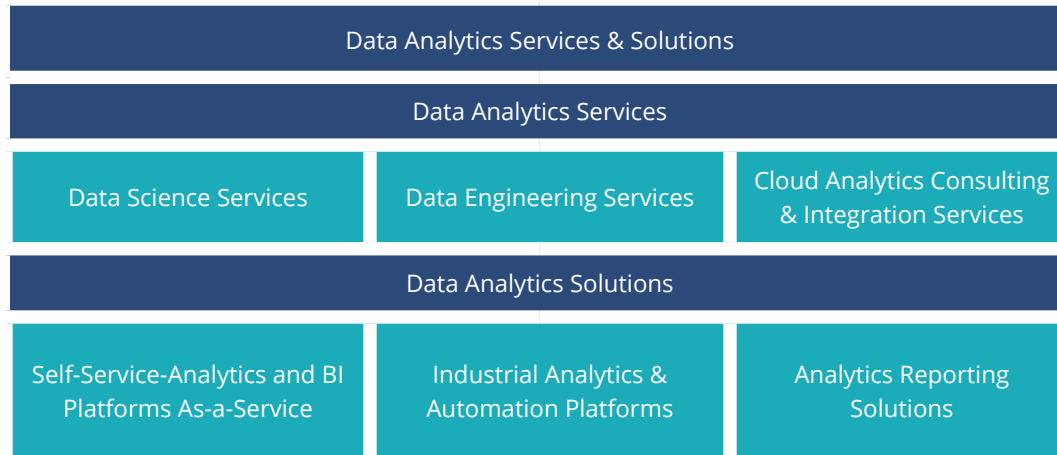## For a lot of companies, Data Analytics is becoming the key competitive factor.

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:

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Introduction

Simplified illustration

Data Analytics Services & Solutions		
Data Analytics Services		
Data Science Services	Data Engineering Services	Cloud Analytics Consulting & Integration Services
Data Analytics Solutions		
Self-Service-Analytics and BI Platforms As-a-Service	Industrial Analytics & Automation Platforms	Analytics Reporting Solutions

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.

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Provider Classifications

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

Leader	Product Challenger	Market Challenger	Contender
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.	The "product challengers" offer a product and service portfolio that provides an above-average cover-age 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 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.	"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.

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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

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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

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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

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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

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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
Nemetris	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 SCIENCE SERVICES

Definition

Data Science includes scientific methods, processes, algorithms and systems for the extraction of insights, patterns and conclusions from structured as well as unstructured data. Services include consultation for defining targeted analyses services, implementation of methodology as well as training of data scientists.
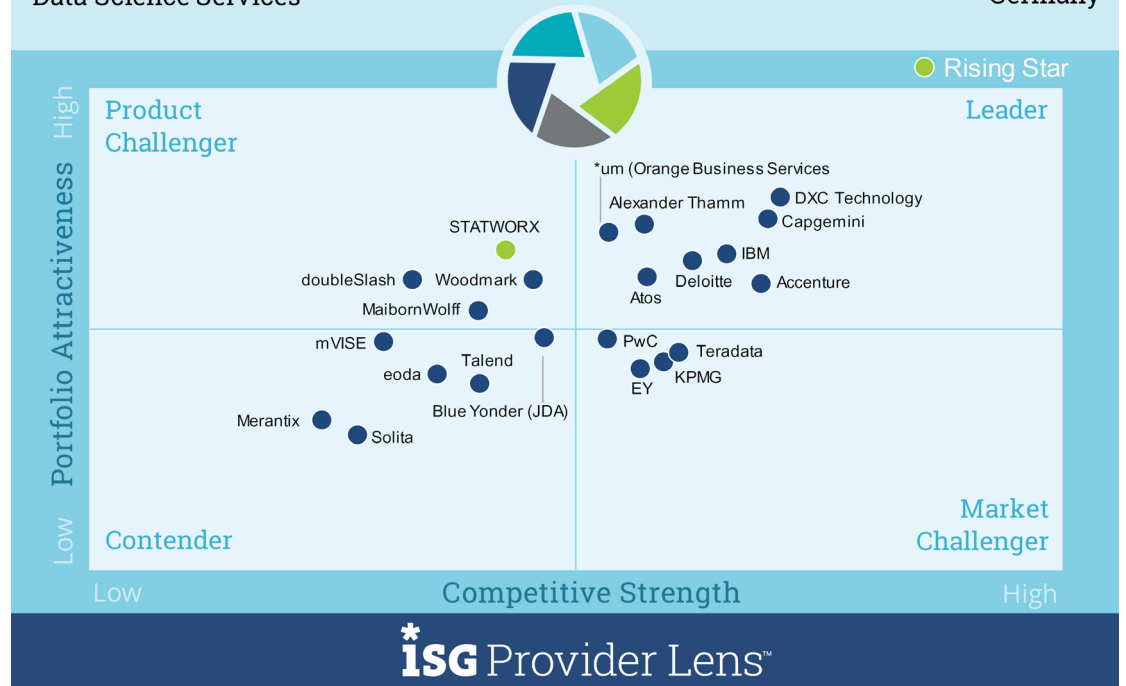
Source: ISG Research 2019

DATA SCIENCE SERVICES

Eligibility Criteria

- Strategie, vision and consulting expertise
- Approach methodology and range of the service portfolio
- Competence and number of Data Science experts in the German market
- Technological expertise and competence for independent consultation and choice of solution providers

Observations

This year, many companies start implementing data analytics, especially Data Science as part of the digital transformation in product manufacturing and service delivery.

Data Science is currently in transition mode. Advanced data technologies are in the process of taking over routine business processes for improved efficiency and productivity. Simultaneously, more complex tasks in data analysis are being addressed. The roles and responsibilities of data scientists will continue to evolve.

The increasing automation of business processes will offer intelligent tools and thereby better capabilities for analysis to data scientists. The data scientist will increasingly deal with complex business problems. Routine processes will be automated with advanced technologies.

DATA SCIENCE SERVICES

Observations (cont.)

- **Atos** advises customers in the field of Data Science based on its comprehensive understanding of technology and the market. The provider is ranked as one of the pioneers in this sector.

- **Capgemini** combines Data Science technology and consultation expertise in order to develop innovative solutions for its customers. Reference customers in all sectors, especially large ones, prove the extensive expertise as well as the strong ecosystem of partners which enable the provider to advise customers neutrally and independent of any technology.

- **dxc Technology** owns a huge resource pool of data scientists with relevant expertise, making it one of the most experienced providers. The comprehensive sector expertise and the technology-independent approach makes it one of the most competitive providers in Germany.

- **Accenture** convinces with its "Applied Intelligence" approach and uses it to focus on the goal of developing distinct competitive advantage for its customers. Based on its global pool of AI experts and substantial investments in acquiring additional resources in this field, Accenture is positioned as a market leader.

- **IBM** considers Data Science services as one of the key components in its portfolio. It can boast of one of the most diversified range of offerings available in the market and can convincingly substantiate this claim with relevant use-cases.

- **Alexander Thamm** is an expert in the field of data science and is one of the first companies to engage with this subject matter. It has a comprehensive expertise now which has been developed and steadily enhanced through numerous projects. An in-house training program for the role of data scientist ensures the necessary expertise during the current phase of growth.

- ***um (Orange Business Services)** develops its own analytical model with a clear focus on Industrie 4.0 and IoT. Its positioning as a technology and vendor neutral provider enables an optimal fulfilment of customer requirements in the area of Data Science.

DATA SCIENCE SERVICES

Observations (cont.)

- As a classical auditing focuses on data analytics within the framework of management consulting and effectively supports customers in the integration of Data Science with business processes. Deloitte's good relationships at the top level provide access to other divisions and their Data Science needs. This helps it gain a competitive advantage amid other players with strong technological and service expertise in the IT sector.

- **STATWORX** is a provider with strong potential, having successfully executed numerous projects across diverse sectors and company sizes. Apart from providing comprehensive support to its customers, STATWORX offers a vendor neutral consulting service and has good chances of coming close to the best providers in the German market, through the continuation of its strategy with regard to developing further resources in the area of Data Science.

ACCENTURE

Overview

Accenture Services GmbH is a leading global IT services provider and stands out for its broad range of portfolio. It serves its customers through multiple locations across Germany.

Caution

Accenture does not have a differentiated pricing: Accenture is an established IT service provider with an extremely high expertise and hence the pricing is rather part of the premium segment. This could deter the customers from medium-sized enterprises.

Strengths

Accenture brings its extensive expertise to customer projects: Accenture is quite diversified and enables, through its "Applied Intelligence" approach, an integrated and clear, data-based strategy focused on the main goal of generating competitive advantage in different divisions.

As an established consulting firm, the company has strong manpower at its disposal: Accenture benefits from the know-how of its globally spread 6000 AI experts. Compared to competitors, there is already a sizeable pool of experts in Germany. At the same time, Accenture is investing massively in further development of relevant resources.

Accenture follows a cross-sector service approach: Accenture has an in-depth understanding of industry segments. Learnings from all these projects help customers in specific sectors to enhance the efficiency of their corporate structures and processes.

2019 ISG Provider Lens™ Leader

Accenture is one of the leading providers of data science services in the German market. The comprehensive portfolio is impressive and is being implemented by leading experts.

ALEXANDER THAMM

Overview

Alexander Thamm, headquartered in Munich, is an expert in the field of Data Science. The company regards Data Science as its core business and focuses strongly on ML and AI technologies as well as Deep Learning.

Strengths

Alexander Thamm's portfolio covers a broad spectrum: As Alexander Thamm has been engaging with Data Science right from the beginning, it can rely on its wealth of experience from numerous data analytics and AI projects today. These lead to continuous portfolio enhancement and optimization.

Alexander Thamm trains its own local experts: Alexander Thamm countered the shortage of skilled professionals with an in-house training program (Data Science Trainee Program). In this way, practical customer experiences can become part of the training and experts can be trained in line with market requirements. As a result of this training program, the company has increased the number of data scientists driving growth.

Alexander Thamm relies on a wide network of partners: Alexander Thamm uses and tests a number of relevant tools by software and infrastructure providers. This experience is used to provide vendor-independent and neutral consultation to customers.

Caution

Alexander Thamm needs to professionalize its own processes with growth: Strong company growth, and the move out of the "Start-up-Phase", lead to organizational challenges which need to be addressed as a part of its own change-management.

Alexander Thamm needs to expand and highlight its geographical coverage: Because of its strong local concentration in certain business centers, large international companies may be unsure about a global service delivery.

2019 ISG Provider Lens™ Leader

Alexander Thamm is a pioneer in data science consultation. A number of successful projects and strong growth in sales and its customer base confirm the position as a market leader in this field.

ATOS

Overview

The French IT services provider is established strongly in the German market. It can advise customers in varied Data Science projects because of its local presence, understanding of local requirements and extensive technological know-how.

Caution

Atos has strong references in Data Science but only in the public sector: The company needs to broaden its base and strengthen its presence in other sectors to keep up with market growth.

Strengths

In-depth understanding of the market and a broad portfolio: Atos ranks as one of the pioneers in Data Science in the German market. The provider offers an extensive range of services through experienced specialists and through the execution of diverse projects for different customers.

Tight integration between Services & Solutions: As an integrator, Atos focuses on close relationship between the solution and the consultation. The approach ranges from standard workshops to identify use-cases for the formulation of a technological strategy.

Platform independence: The provider fundamentally operates platform-independent when it comes to Data Science scenarios. An integration with platforms already used by customers is possible.

2019 ISG Provider Lens™ Leader

Atos benefits from its extensive expertise and experience in the German market. The consultation is based on a tight integration of services and solutions, which benefits the customers.

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CAPGEMINI

Overview

Capgemini offers a portfolio of integrated services which combine the latest technology with an in-depth sector expertise. The Data Science & Analytics Practice offers a combination of Data Science technology and consulting expertise with a view to develop innovative models and solutions in this field.

Strengths

Capgemini has a comprehensive and detailed Analytics framework: Capgemini has a well-defined and comprehensive consulting approach which covers every possible customer requirement. To serve this purpose, a large number of experts are available for consultation.

Capgemini proves its capabilities with extensive references: Capgemini's Data Science Practice can showcase extensive projects in nearly all sectors. The customer benefits from this extensive experience through its homogeneous approach in heterogeneous projects.

Capgemini relies on a well-established partner network: Capgemini works together with nearly all the relevant technology partners in the field of Data Science. Therefore, the consultation is neutral and independent of vendors.

Caution

Capgemini focuses less on the German medium-sized enterprises: The company approaches the customer situation with fewer modular solutions and with highly qualified consultants. The sheer size of the company can deter the German mid-size companies as they shy away from high costs. Capgemini should develop a dedicated strategy for German SMEs in order to achieve success even in this market segment.

2019 ISG Provider Lens™ Leader

Capgemini is undoubtedly one of the market leading providers in Data Science services. Customers benefit from a well-defined consulting approach that covers every possible requirement.

DXC TECHNOLOGY

Overview

DXC technologies was formed in 2017with the merger of CSC and the services division of HPE and since then ranks as one of the most important players in Data Science. The company focuses on Data Analytics and AI development services as well as accelerators which are available as micro services.

Strengths

Large resource pool: With hundreds of data scientists, DXC has a large resource pool for timely or speedy execution and scaling of projects. With an average of more than 18 years of experience in analytics in more than 200 use-cases, the company ranks among the most experienced market players and can meet sector as well as role-specific requirements.

DXC operates vendor-independent: DXC Technology provides a vendor-neutral consultation, that is, it also integrates leading technologies of its partner companies.

Extensive sector expertise: DXC Technology is quite diversified and covers all possible sectors. This benefits the internal resources as well as customers with fast learning curves and extensive experience.

Caution

Limited number of use-cases: The number of published local use-cases and reference customers for Data Science is limited and should be increased for substantiating the expertise.

SMEs should be addressed better as target audience: Small and medium enterprises, who have not yet dealt with the topic of Data Science in depth, may not shortlist the company right away while choosing a provider, owing to its selective market strategy in this area.

2019 ISG Provider Lens™ Leader

DXC Technology is a market leader in Data Services. Customers benefit from its extensive experience and the sector know-how.

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DELOITTE

Overview

Deloitte has evolved from a classical auditing firm to a management consultancy which is increasingly focusing on Data Analytics. Thus, Data Science services represent a core element of its portfolio.

Strengths

Deloitte sets itself high quality standards and offers highly qualified expertise: Deloitte helps customers overcome testing and complex challenges and utilize the existing potential, for sustained growth and optimal preparation for the future. The integration of Data Science in business processes represents this primary goal. Customers benefit from the extensive experience and expertise of the staff.

The company has an established presence with most potential clients: Owing to its expertise and experience as an auditing firm, Deloitte has a big brand with end-users and access to all the prominent DAX companies. That supports the company in the business development for Data Science services in other divisions.

Deloitte has a high growth rate: In order to do justice to customer needs, Deloitte is investing heavily in the development of its Data Science unit. Focus is on resources who are expected to implement Data Science in the industry (such as analytics for predictive maintenance).

Caution

The recognition as an analytics advisory provider needs to be strengthened further: Deloitte is often perceived as a classical auditing firm: The external communication needs to focus strongly on the capability and portfolio for Data Analytics and Data Science.

Deloitte is focused more on large companies: The sheer size of the company and the partly complex structure of its portfolio can deter mid-range companies. A clearer overview, including a clear structure of its services would enable potential customers to understand its services better.

2019 ISG Provider Lens™ Leader

Deloitte made the leap from a classical auditor to IT advisory. Data Science services represent a vital growth engine for the whole unit.

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IBM

Overview

IBM is a pioneer of the IT world and one of the early developers of Data Science services. As a global provider with extensive experience, Data Science services form a key component in its portfolio.

Caution

The comprehensive portfolio is complex to understand: The richness of the portfolio can be confusing for external parties. A more logical structure would help comprehend the services better, internally as well as externally.

Strengths

IBM offers a comprehensive portfolio coupled with specific technologies: IBM's portfolio is very extensive. For nearly every use-case, it has its own tools to be applied as part of the service proposition. Customers benefit from a good interplay between tools and the integrated consulting capability.

Customers benefit from the in-house methods: IBM has developed its own methods which systematically help customers on their way to become a data and knowledge-based company. There is a strong focus on all common business analytics deployments which gain efficiencies by pairing with Machine Learning or AI methods.

IBM substantiates its capabilities with extensive references and use-cases: IBM can convincingly demonstrate extensive use-cases and customer case studies across different industries. Owing to its considerable market share in other areas like Watson, IBM is well placed for meeting complex customer needs.

2019 ISG Provider Lens™ Leader

As a pioneer in Data Science, IBMis a force to be reckoned with. Services are enhanced with its own excellent tools. This combination is yet to find its match in the market.

*UM (ORANGE BUSINESS SERVICES)

Overview

unbelievable machine (*um) is part of the Basefarm group which was acquired by Orange Business Services in 2018. *um has roughly 150 experts for tailor-made Data Science services across Germany.

Strengths

Customers benefit from a very integrated Data Science portfolio: um offers its customers tailor-made integrated solutions through seamless integration of its core services in "Big Data", "Cloud" and "Security". The seamless integration is greatly valued by the customers.

*um delivers tailor-made solutions for customers in all sectors: *um develops nearly all possible algorithms and analytical models required to generate insights from data. It focuses on Industry 4.0 and IoT where deep learning technologies are used for predictive maintenance and anomaly detection.

*um relies on its extensive partner network for a vendor-neutral technology architecture: *um has partnered with all common technology providers, thereby enabling vendor-neutral consultation for meeting customer needs in the best possible manner.

Caution

The integration between *um and Basefarm is still incomplete: The company was integrated in a global company with its acquisition last year. The integration could bring about confusion in the workforce and could lead to functional and cultural changes.

The Data Science Services Unit has scope for further expansion: In order to take advantage of the increasing customer demand, *um should invest in developing further resources.

2019 ISG Provider Lens™ Leader

*um is one of the pioneers in the Data Science market and has implemented the relevant developments in its portfolio early on. There is room for further investments with its integration in the parent company, Orange Business Services.

RISING STAR: STATWORX

Overview

STATWORX is an emerging consulting company for Data Science, Machine Learning and AI. The German company, headquartered in Frankfurt/Main, offers a comprehensive solution for planning, development and execution of Data Science and AI projects.

Strengths

STATWORX has a comprehensive Portfolio: The company can show a number of relevant use-cases and reference customers. It has customers across sectors and company sizes. The large number of successful projects (200+) will also benefit future customers.

STATWORX offers extensive support at all stages of implementation: With an agile and iterative approach, it supports its customers in Data Science projects right from the ideation stage with use-cases and prototypes through to the final implementation. This inspires confidence in customers as there is no black-box approach lacking transparency in the results of different stages.

The company offers its customers vendor-neutral technologies and programming languages: The consulting portfolio includes all common programming languages (R, Python, Dataiku, DSS etc.) and tools (R Shiny, Tableau, Qlik etc.). The broad spectrum ensures neutrality and independence in order to provide its customers a tailored consulting approach.

Caution

STATWORX is successful but lacks critical mass: The company does not have many experts in comparison with competitors. Because of insufficient resources, it cannot often deliver high-revenue projects which could be a deterrent for customers with large-scale requirements.

STATWORX needs to make organizational changes for better growth: Strong growth causes internal changes and binds resources urgently needed for projects.

2019 ISG Provider Lens™ Rising Star

STATWORX is well-established as a specialist company in the German Data Science market.
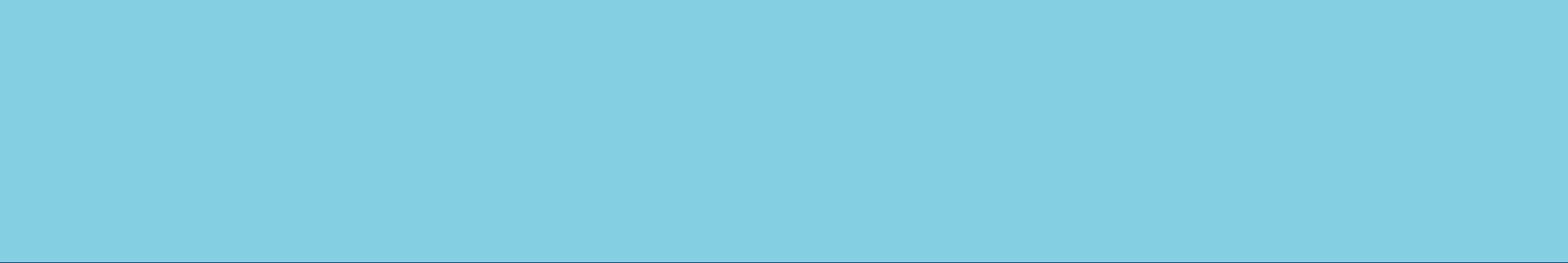
Methodology

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 Superieures Spécialisées on international management from the Université de Rennes and a diploma in strategic Marketing from Henley Management College.

ISG Provider Lens™

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Authors and Editors

Steffen Nolte, Author
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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