



***ISG** Provider Lens™

2022

Analytics
Services 2022

imagine your future®

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 800 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis. Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,300 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data. For more information, visit www.isg-one.com.



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Introduction

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 mid-sized 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 modelling 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.

The ISG Provider Lens™ study offers IT-decision makers

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on different markets, including U.S., Germany, U.K., and Brazil

Our study provides an important knowledge base for decision-makers for positionings, key relationships and go-to-market considerations. ISG advisors and enterprise clients, on the other hand, utilize the information collected in these reports to evaluate their current vendor relationships and potential engagements.

Quadrant Research

As part of this ISG Provider Lens™ quadrant study, we are covering the following three quadrants for data analytics services: Data Science Services; Data Engineering Services; Data Monetization Services.

Simplified illustration



Source: ISG 2022

Data Science Services

In this quadrant, ISG evaluates the portfolios of providers that offer advisory and system integration services based on data science. The providers qualifying for this quadrant offer services to integrate scientific methods with business context for their clients. By combining domain knowledge and expertise in a client's industry, these providers resolve critical business challenges, thereby enabling clients to experience a substantial, data-driven business growth through actionable insights. Information generated through data science may even lead to new business models and revenue streams. The objective is to define and deploy contextual questions to extract relevant information from a vast number of data streams; data science leverages both structured and unstructured data.

Service providers evaluated in this study are expected to address enterprise requirements, including, but not limited to, consulting, identifying business use-case, and developing statistical models and algorithms. They are capable of modelling and customizing machine learning algorithms and workflow using best-of-breeds solutions to deploy their services efficiently. These providers also offer support and training services that can be purchased as standalone offerings, separate from other service contracts.

Eligibility Criteria:

- Offer strategy, vision and consulting expertise
- Offer a **structured approach methodology** and a service portfolio range that includes proprietary offerings, but are not limited to, **industrialized playbooks, structured frameworks, AI and machine learning platforms, accelerators, advanced automation capabilities and workbenches**
- Show established competence, with a **number of data science experts** in respective regions, delivering specific services through onshore personnel because of a **deep understanding of the local market dynamics, culture and regulatory requirements**, and language, needed to successfully provide the services considered within the scope of this market category
- Have the **technology expertise and business knowledge** of both region- and industry-specific requirements for clients, statistical and mathematical modeling competence, together with independent consultation, and options of solution providers
- Offer **centers of excellence and readily available data models** for vertical and functional business context
- Have the experience, reflected in the solutions offered **for federated learning, data literacy, advanced analytics (computer vision, audio, natural language processing [NLP], natural language generation [NLG] and Graph DB)**; also offer support and training services that can be purchased as standalone offerings, separate from other service contracts

Data Engineering Services

In this quadrant, ISG assesses service providers in the data engineering services category that are capable of delivering a comprehensive set of services to collect and aggregate structured, partially structured and unstructured data from a number of sources — from text to calculations to images to sound. Data are obtained from different systems, processed in context and made available in a structured manner, in keeping with access settings. Offerings from services providers include, but are not limited to, developing data pipelines and data models, managing file format conversion, and undertaking data transformation — cleansing plus extract, transform and load (ETL) operations. This goes even further to include managed services to provide applications. Data engineering in the context of this study also includes, but is not restricted to, building data warehouses and data lakes and goes further toward empowering clients to leverage the idea of big data analytics. Service providers should also possess capabilities in developing and implementing data governance systems, policies and procedures for effective and efficient data management. Data handling service providers are tasked with end-to-end management of data storage, sharing, archival and retrieval by adhering to relevant compliance guidelines. The quadrant encompasses services for ensuring data quality, data security and control, compliance with GDPR, creation and management of data lakes, among others.

Eligibility criteria:

- Have the **technology know-how and architectural consulting** expertise
- Display competence in the **approach taken and methods applied**, and the depth of the service portfolio
- Offer competence with a **number of data engineering experts** in respective regional markets
- Show **technology expertise, business knowledge and domain competence**, with independent consultation, and options of solution providers
- Ability to provide **standardized/customized frameworks and platforms** for data aggregation and cleansing
- Experience in **building data hubs, data fabrics, modular data lakes**, multicloud data integration capabilities and access to partner data ecosystems
- Offer **support and training services** that can ideally be purchased as standalone offerings, separate from other service contracts

Data Monetization Services

In this quadrant, ISG assesses providers of consulting services, system integration and managed services, supporting clients to obtain their business objectives. To foster a significant improvement in customer business operations — on the journey to becoming a digital enterprise — these providers offer advanced solutions to collect, aggregate and orchestrate data from several sources. The providers deliver advisory and consultation, solutioning and support services, dedicated to leverage all kinds of data, including the inconspicuous data of an enterprise. Data monetization involves unrestricted access to and sharing of data within an enterprise, as well as externally to the large ecosystem of partners, customers, technology vendors and hyperscalers — the intent is to drive business value, resulting in measurable monetary returns for the concerned enterprise. While the direct selling of data to third-party organizations is considered as a part of the offering, the emphasis is on driving new revenue streams within the organization and its partners in the supply chain. The approach combines several aspects of data science, data engineering, data visualization and business intelligence to drive data sharing and derive insights, at scale. Data monetization can also include creating value out of data by conducting data collection or providing analytics results to others, and services to provide data hubs to closed peer groups.

Eligibility criteria:

- Have **technology know-how and architectural consulting** expertise
- Provide knowledge about **data, value of data and location of data** within an enterprise's digital infrastructure
- Offer a structured approach and a portfolio range that includes proprietary offerings, but is not limited **to industrialized playbooks, structured frameworks, AI and machine learning platforms, accelerators, advanced automation capabilities and workbenches**
- Have the competence and offer a **number of data engineering experts** in respective regional markets
- Ability to provide **independent consultation, and options** in terms of solution providers
- Capable of providing **standardized and customized frameworks and platforms** for data aggregation and cleansing
- Experience in **building data hubs, data fabrics, modular data lakes, multi-cloud data integration capabilities and access to partner data ecosystems**
- Offer **support and training services** that can ideally be purchased as standalone offerings, separate from other service contracts

Quadrants by Region

Quadrant	U.S.	Germany	U.K.	Brazil
Data Science Services	✓	✓	✓	✓
Data Engineering Services	✓	✓	✓	✓
Data Monetization Services	✓	✓	✓	✓

Schedule

The research phase falls in the period between **August and September 2022**, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in **December 2022**.

Milestones	Beginning	End
Launch	August 01, 2022	
Survey phase	August 01, 2022	August 25, 2022
Sneak previews	October, 2022	
Press release	December, 2022	

Please refer to <https://isg-one.com/research/isg-provider-lens#quadrant> to view/download the ISG Provider Lens™ 2022-23 research agenda:

Access to Online Portal

You can view/download the questionnaire from [here](#) using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

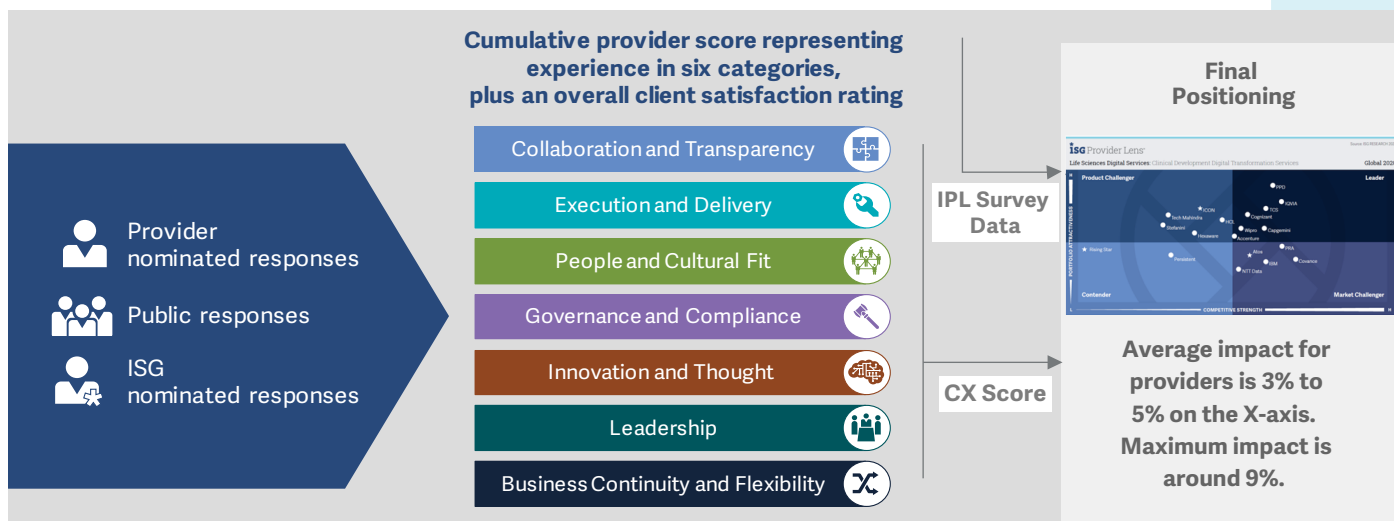
Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing work identified by the clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not to produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for Nominations

The Star of Excellence is an independent recognition of excellent service delivery based on the Voice of the Customer concept. The Star of Excellence is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.



Providers are invited to [nominate](#) their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence will be recognized as the leading industry recognition for client service excellence and will serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence [website](#).

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply. Here is the email address: Star@isg-one.com

Partial list of companies being invited for the survey

Are you in the list or do you see your company as relevant provider that is missing in the list?

Then feel free to contact us to ensure your active participation in the research phase.

*um (The unbelievable Machine Company)	Claranet	Genpact
Accenture	Cognizant	GFT
Action	Compasso UOL	GoodData
Addepto	Data Insights	GyanMatrix
Alexander Thamm	Datamatics	Happiest Minds
All for One Group	DataSprints	HCL
Allgeier	Deal	Hexaware
Altair	Delaware	HPE
Analytics8	Deloitte	IBM
ASG Technologies	doubleSlash	Icaro tech
Ativy	DS Stream	IGT Solutions
Atos	DXC Technology	Ilegra
Avanade	ELEKS	Impact Analytics
Avantgarde Labs	Elevondata	Incedo
Avenue Code	Emerton Data	Indium Software
b.telligent	Emtec	Infosys
Birlasoft	Emu Analytics	Innominds
Blue Yonder	eoda	Intellias
Blueshift	EPAM	InterSystems
BRQ	EXL	Iteris
Capgemini	Extreme Digital Solutions	Keyrus
Caserta Concepts	EY	KPMG
CGI	e-Zest	Kriptos
Chrysalis Partners	FORCAM	Krish Compusoft Services (KCS)
	GAVB	LatentView Analytics

Partial list of companies being invited for the survey

Are you in the list or do you see your company as relevant provider that is missing in the list?

Then feel free to contact us to ensure your active participation in the research phase.

Leega	Persistent Systems	TCS
Lingaro	PwC	Tech Mahindra
Logicalis	Quantiphi	TEG Analytics
LTI	Quantium	Terralogic
Marmeladenbaum	Quest Global	ThirdEye Data
Mckinsey & Company (Quantum Black)	Reply	Toptal
MD2 Consultoria	Samsung	Tredence
Merantix	ScienceSoft	Trianz
Mindtree	SDG Group	V8 Consulting
MobiDev	Semantix	Velotio
Mphasis	SG Analytics	Virtusa
mVise	Sigmoid	Volansys
Nativebyte Softwares	Sopra Steria	Wipro
N-iX	Sparity	WNS
NTT DATA	statworx	Woodmark
Oper	Stecktra	Yantra
Opitz	Stefanini	YASH Technologies
Orange Business Services	Suneratech	Zensar
	Syntelli Solutions	

Contacts for This Study



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Maharshi Pandya
Enterprise Content and Global
Overview Analyst



Holm Landrock
Lead Analyst, Germany



Vartika Rai
Enterprise Content and Global
Overview Analyst



Marcio Tabach
Lead Analyst, Brazil



Ankur Taneja
Global Project Manager

Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.

ISG Provider Lens™ QCRT Program Description

ISG Provider Lens™ offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context. In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's Quality & Consistency Review Team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,
- Advise on service providers inclusion, participate in briefing calls,
- Give their perspectives on service provider ratings and review report drafts.

The ISG Provider Lens™ QCRT program helps round out the research process, supporting comprehensive research-focused studies.

Quality & Consistency Review Team for This Study



Sush Apshankar
Principal Consultant



Stephen Coward
Principal Consultant



Olga Kupriyanova
Principal Consultant



Dries Ballerstedt
Principal Consultant

Do you need any further information?

If you have any questions, please do not hesitate to contact us at isglens@isg-one.com.