ISG Provider Lens™

Advanced Analytics and AI Services

A research report comparing provider strengths, challenges and competitive differentiators

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Enterprises must navigate data complexity and AI advancements for real-time and actionable insights.

The U.S. data analytics and AI market is undergoing transformative changes and a dynamic evolution driven by technological advancements, regulatory changes and enterprise demands. The market is also experiencing an accelerating need for enterprises to integrate advanced technologies, especially AI, into their business strategies.

The increased emphasis on AI, both as a tool for data science services and a key enabler of business transformation, is reshaping the landscape . Enterprises are grappling with the need to harmonize technical, statistical and business-oriented perspectives to drive more effective data-driven decision-making. This challenge is intensifying as companies recognize the necessity of business-led data science initiatives, prioritizing AI investments that are directly aligned with strategic business goals.

This trend is particularly underscored by the rise of generative AI (GenAI), hailed as the next frontier in addressing complex business challenges by automating previously manual-intensive tasks such as content generation, report summarization and predictive analytics. GenAI is seen as a critical next step in AI evolution, offering the potential to automate routine processes, assist with predictive modeling and generate advanced insights at scale.

However, U.S. enterprises continue to face a complex array of challenges as they strive to incorporate data-driven decision-making and integrate AI technologies into their business operations. The landscape is shifting rapidly, with data modernization, AI adoption and advanced analytics capabilities at the forefront of transformation efforts. However, these advancements are not without hurdles. The challenges can largely be divided into two major areas — data foundations and strategy challenges and business context-related challenges. A deep dive into these challenges

To thrive in a **data-driven world,** enterprises must **master governance, quality** and **AI adoption.**

reveals the intricate barriers that enterprises must overcome to capitalize on data and AI-driven opportunities.

Data-related Challenges

- **Data availability and quality:** One of the fundamental challenges for enterprises is ensuring the availability of high-quality data. Poor data quality can lead to inaccurate analytics, unreliable insights and misinformed decisions. Data must be accurate, complete, timely and free of errors. However, many organizations still struggle with data silos, incomplete datasets and inconsistencies across different data sources. Inconsistent data entry practices, poor data validation processes and manual data handling further exacerbate quality challenges. Enterprises need robust data quality frameworks and tools to monitor and improve the integrity of their data assets.
- **Data volume and variety:** Enterprises are generating vast amounts of data across multiple systems and platforms, leading to volume and variety challenges. With structured, semi-structured and unstructured data coming from a wide range of sources, including IoT devices, social media and transactional systems, integrating and processing this diverse range of data is a significant hurdle. The sheer volume of data also strains legacy systems, making real-time data processing and decision-making difficult.
- **Data observability and governance:** With increased regulatory scrutiny and growing concerns about data security and privacy, data observability and governance have become critical components of data strategy. Enterprises need real-time visibility into data flows, data usage and potential issues such as data quality or security risks. Ensuring data is handled per evolving regulatory frameworks such as GDPR and CCPA is essential for avoiding compliance pitfalls.
- **Inefficient data sharing and inconsistent data definitions:** In many organizations, the ability to share data across departments and functions is hindered by poor data integration capabilities, incompatible systems and inconsistent data definitions. This inefficiency limits the scope of insights drawn from data, creating barriers to effective collaboration and cross-functional decision-making.
- **Data storage limitations, data silos and inaccessibility:** Data storage limitations pose a significant barrier to enterprises' ability to scale their data analytics capabilities. Data silos restrict the free flow of data across the organization, preventing comprehensive analysis and insights. Accessing the right data at the right time remains a challenge for many enterprises, especially when data is stored in disparate systems or outdated formats.
- **Data stewardship:** Effective data stewardship is key to ensuring data is used ethically, securely and in accordance with organizational goals. However, many enterprises face challenges in defining and executing data stewardship practices, leading to issues such as data misuse, uncoordinated data management efforts and inadequate protection of sensitive information.

Business Context-related Challenges

- **Lack of customer intelligence and CX:** A common challenge for enterprises is the difficulty in building deep and actionable customer insights. A lack of comprehensive customer intelligence — especially from diverse and unstructured data sources such as social media, customer support tickets or IoT devices — limits an organization's ability to personalize offerings and enhance CX. This makes it difficult for enterprises to differentiate themselves in a competitive market.
- **Limited scalability and difficulty in real-time analytics:** As businesses grow, so do their data volumes. The inability to scale analytics to accommodate this growth, especially in real-time, becomes a major bottleneck. Enterprises need to have the ability to derive actionable insights instantly. However, many organizations face infrastructure and expertise challenges to process real-time and large volumes of data.

- **Cloud computing costs, legacy systems and talent shortage:** While cloud computing offers significant benefits, enterprises often face the challenge of rising costs related to cloud storage and compute power, especially when scaling up their analytics efforts. Legacy systems, particularly those reliant on on-premises infrastructure, further complicate cloud migration, creating friction in efforts to modernize IT environments. Talent shortage, particularly in AI, data science and cloud computing, prevents organizations from fully capitalizing on their data potential.
- **Security vulnerabilities, ethical and privacy issues:** As data-driven technologies such as AI continue to evolve, the risks associated with data security, privacy and ethics also increase. Data breaches, misuse of data and violations of privacy regulations can have devastating financial and reputational impacts. AI models can inadvertently perpetuate biases or violate ethical principles, further complicating governance and risk management.

Technology Trends Gaining Traction in 2024 and 2025

Service providers are increasingly adopting and developing innovative solutions to meet the growing demands of enterprises in data management, ML and AI deployment. By offering solutions, accelerators and tools that address challenges such as automation, scalability, security and real-time decision-making, these service providers play a crucial role in enabling organizations to harness the full potential of their data and AI investments. As new trends such as DataOps, MLOps, IoT, Edge AI and adversarial ML continue to evolve, service providers must stay agile and innovative to support enterprises in navigating these complex and dynamic landscapes.

Below is an in-depth analysis of several key service provider trends and provider offerings, highlighting how they reshape the market.

- **DataOps:** DataOps seeks to bring the same agility, automation and collaboration to data engineering that DevOps brings to software development. This approach focuses on reducing bottlenecks, improving data quality and enabling faster access to trusted data, thereby ensuring data is always ready for analysis and AI model training.
- **MLOps:** MLOps, like DataOps, focuses on streamlining the development, deployment and maintenance of ML models at scale. The MLOps trend is driven by the growing need for organizations to manage the complexity of ML lifecycle management and ensure that models can be delivered quickly, accurately and at scale.
- **AnalyticsOps:** AnalyticsOps is a specialized practice that applies DevOps principles to the management of analytics workflows and focuses on the orchestration of analytics workflows, from data preparation to generating business insights. AnalyticsOps will help streamline the process of analyzing data and delivering insights at speed and scale, ensuring analytics teams can collaborate more effectively and reduce the time it takes to generate actionable insights.
- **TinyML:** This trend is driven by the proliferation of IoT devices, where running sophisticated ML models on edge devices with limited computational power can drastically improve real-time decision-making without relying on cloud infrastructure.
- **Automated Machine Learning (AutoML):** AutoML aims to simplify the process of developing m; models by automating tasks such as feature selection, model training and hyperparameter tuning. By making ML more accessible, AutoML enables organizations to deploy models without extensive data science or ML expertise.
- **Small data:** Small data refers to manageable and structured datasets that are often more domain-specific than the massive volumes associated with big data. Small data analytics focuses on deriving insights from small and high-quality datasets that can still offer significant value for specific business applications.
- **IoT and Edge AI:** The convergence of IoT and Edge AI is a key trend driven by the need for real-time decision-making in industries such as manufacturing, healthcare, automotive and logistics. IoT devices

generate vast amounts of real-time data. By processing this data locally on edge devices using AI models, organizations can make immediate decisions without sending data to the cloud.

Enterprise Trends and Developments in 2024 and 2025

As enterprises increasingly recognize the power of data to drive business transformation, several key trends are shaping the data and AI landscape. These trends reflect the evolving needs of businesses, rapid adoption of advanced technologies, shift toward more sophisticated data management and analytics models and reimagination of how organizations manage, analyze and derive value from their data.

- **Democratization of data:** Data democratization makes data accessible to a broad range of users within an organization, empowering non-technical stakeholders to analyze and use data without any specialized skills. Traditionally, data analysis has been confined to data scientists, analysts and IT teams. However, the rise of self-service analytics platforms, low-code/no-code tools and user-friendly dashboards enables data access to business users across all levels. These platforms often incorporate NLP capabilities, allowing business users to interact with data using simple queries, enhancing the accessibility of insights.
- **AI-powered insights via augmented analytics:** Augmented analytics uses AI and ML to enhance traditional analytics processes, automatically identifying insights, trends and patterns in data without requiring manual intervention. By combining data discovery, predictive analytics and NLP, augmented analytics helps organizations derive actionable insights faster and more effectively.
- **Continued shift toward embedded analytics:** This trend is gaining traction as organizations seek to make data-driven insights an inherent part of everyday business processes rather than separate, standalone tasks. By embedding analytics into applications, employees can make informed decisions within the context of their workflows without switching between disparate systems or tools.
- **Data mesh architecture:** Data mesh's architectural approach to decentralized data management shifts away from traditional monolithic data lakes and warehouses toward focusing on treating data as a product, with ownership distributed across various domains within an organization. Each domain is responsible for managing its data pipeline, including data quality, access and governance.
- **Operational data warehouse:** Operational data warehouse (ODW) integrates operational and analytical data to support real-time decision-making across business operations. As more organizations migrate to the cloud, the cloud-based ODW model is gaining popularity due to its ability to enable real-time analytics, improve operational efficiency and reduce the complexity of maintaining on-premises data infrastructure.
- **Real-time data warehousing and automation:** Real-time data warehousing enables enterprises to process and analyze data as it is generated, providing timely insights that can drive immediate decision-making. The combination of real-time data processing and automation allows organizations to streamline data workflows, reduce latency, and react faster to business needs.
- **Data warehouse as a service:** Data warehouse as a service (DWaaS) is an emerging cloud-based model where organizations can rent a fully managed data warehouse instead of building and maintaining their infrastructure. DWaaS eliminates the need for upfront capital investment in hardware and reduces the operational overhead of managing data storage and processing. This allows businesses to scale their data operations quickly and cost-effectively.

- **Metadata-driven architecture:** Metadata-driven architecture (MDA) refers to the use of metadata to manage, organize and optimize data processes across an organization. MDA enables better data discovery, lineage tracking and governance by providing a comprehensive view of data flows, transformations and relationships. This trend is increasingly important in the era of big data and AI as it helps organizations understand their data's context, quality and security.
- **Convergence of data lakes and data warehouses:** The convergence of data lakes and data warehouses is a growing trend in the data management space. Integrating these two models into a unified platform that can handle both structured and unstructured data enables enterprises to gain a more holistic view of their data assets.

The trends outlined above highlight the increasing sophistication of the data and AI landscape as organizations continue to embrace cloud technologies, AI-powered analytics and more flexible data architectures. These trends point to a future where data is more accessible, actionable and integrated into business operations, enabling organizations to unlock deeper insights and drive significant business value.

To stay ahead of the evolving needs of enterprises, service providers in the data analytics and AI market are enhancing their portfolios with cutting-edge solutions that focus on integrating AI with data science and BI capabilities. Enterprises recognizing the need for a solid data strategy and robust data foundations to fully leverage AI technologies have driven a significant shift toward data modernization. This realization is driving investments in data integration, cloud data platforms and modernization tools that can facilitate the seamless integration of AI-driven solutions. Service providers will continue to play a crucial role in helping enterprises navigate these trends by offering relevant tools, platforms and the expertise needed to manage, analyze and secure data in this rapidly evolving environment.

Enterprises face escalating challenges in managing data volume, quality and accessibility while navigating the complexities of AI integration and governance. As real-time analytics, data silos and scalability issues persist, organizations must adapt to emerging trends such as AI-powered insights, data observability and enhanced cloud solutions to remain competitive and drive innovation.

Provider Positioning

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	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
Accenture	Leader	Not In	Leader	Not In	Leader	Not In
Akkodis	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Altimetrik	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Apexon	Not In	Leader	Not In	Leader	Not In	Leader
Birlasoft	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Brillio	Not In	Leader	Not In	Product Challenger	Not In	Product Challenger
Capgemini	Leader	Not In	Leader	Not In	Leader	Not In
CGI	Product Challenger	Not In	Contender	Not In	Product Challenger	Not In
Chetu	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Cigniti - A Coforge Company	Not In	Contender	Not In	Contender	Not In	Contender

Provider Positioning

	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
Coforge	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Cognizant	Leader	Not In	Leader	Not In	Leader	Not In
Deloitte	Leader	Not In	Leader	Not In	Leader	Not In
DXC Technology	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Encora	Not In	Leader	Not In	Leader	Not In	Leader
EPAM Systems	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Eviden (Atos Group)	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
EXL	Not In	Leader	Not In	Leader	Not In	Leader
EY	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Fujitsu	Contender	Not In	Contender	Not In	Contender	Not In

Provider Positioning

	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
Genpact	Leader	Not In	Leader	Not In	Leader	Not In
Globant	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Grazitti Interactive	Not In	Contender	Not In	Contender	Not In	Contender
HARMAN	Not In	Leader	Not In	Leader	Not In	Leader
HCLTech	Leader	Not In	Leader	Not In	Leader	Not In
Hexaware	Not In	Leader	Not In	Leader	Not In	Leader
HTC Global Services	Not In	Rising Star ★	Not In	Leader	Not In	Leader
IBM	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
IGT Solutions	Not In	Contender	Not In	Contender	Not In	Contender
Indium Software	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger

Provider Positioning

	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
Infogain	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Infosys	Leader	Not In	Leader	Not In	Leader	Not In
Innova Solutions	Not In	Leader	Not In	Leader	Not In	Leader
ITC Infotech	Not In	Product Challenger	Not In	Rising Star ★	Not In	Rising Star ★
KPMG	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Kyndryl	Contender	Not In	Contender	Not In	Contender	Not In
LTIMindtree	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Marlabs	Not In	Contender	Not In	Contender	Not In	Contender
Mastek	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Mphasis	Not In	Leader	Not In	Leader	Not In	Leader

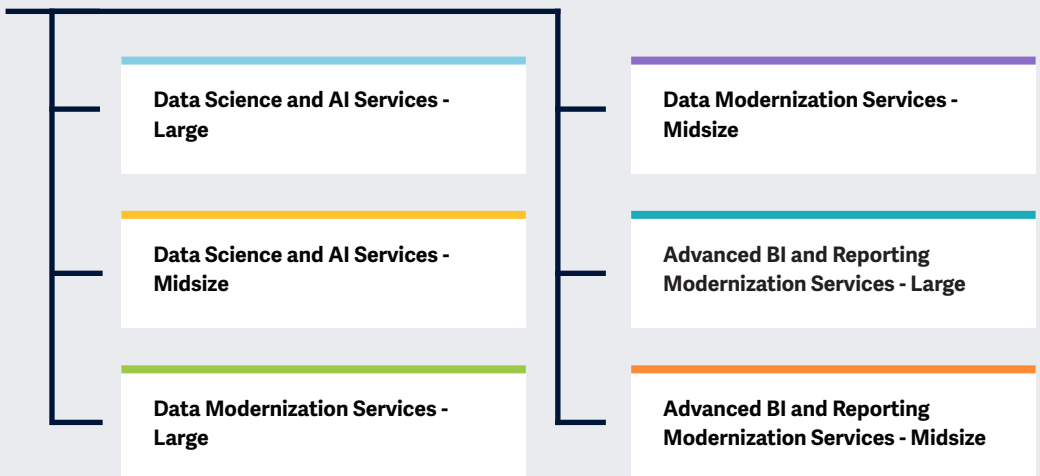
Provider Positioning

	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
NTT DATA	Rising Star ★	Not In	Rising Star ★	Not In	Rising Star ★	Not In
Orion Innovation	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Persistent Systems	Not In	Leader	Not In	Leader	Not In	Leader
PwC	Product Challenger	Not In	Product Challenger	Not In	Product Challenger	Not In
Rackspace Technology	Contender	Not In	Contender	Not In	Contender	Not In
Randstad Digital	Contender	Not In	Contender	Not In	Contender	Not In
SLK Group	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Stefanini	Not In	Leader	Not In	Leader	Not In	Leader
TCS	Leader	Not In	Leader	Not In	Leader	Not In
Tech Mahindra	Leader	Not In	Leader	Not In	Leader	Not In

Provider Positioning

	Data Science and AI Services - Large	Data Science and AI Services - Midsize	Data Modernization Services - Large	Data Modernization Services - Midsize	Advanced BI and Reporting Modernization Services - Large	Advanced BI and Reporting Modernization Services - Midsize
Trianz	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Unisys	Not In	Leader	Not In	Leader	Not In	Leader
UST	Not In	Leader	Not In	Leader	Not In	Leader
Virtusa	Not In	Leader	Not In	Leader	Not In	Leader
Visionet	Not In	Contender	Not In	Contender	Not In	Contender
Wipro	Leader	Not In	Leader	Not In	Leader	Not In
Xoriant	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Zensar Technologies	Not In	Product Challenger	Not In	Product Challenger	Not In	Product Challenger

The study provides insights into the **evolving market trends** and **competitive dynamics** among **advanced analytics and AI** service providers in 2024.



Simplified Illustration Source: ISG 2024

Definition

The analytics services market has become a cornerstone of modern business strategy, essential for empowering enterprises with data-driven decision-making, operational efficiency and competitive advantages. Foundationally, the demand for clean, secure data, coupled with compelling data storytelling and visuals, is increasing as enterprises seek actionable insights.

In 2024, the relevance of analytics and AI services continues to grow, fueled by technological advancements such as GenAI. This prioritizes the need for stronger data foundations, as quality, integrity and comprehensiveness of data are crucial for producing meaningful and accurate outputs.

Enterprises are investing in advanced analytics and AI solutions to enhance operational and business performance, harnessing the true potential of data and driving informed decision-making. The shift toward augmented analytics expands the scope for data democratization, fostering a data-driven culture within enterprises, fueling innovation and agility,

and empowering the workforce to deliver actionable insights. The surge in data volumes due to the increased adoption of cloud and IoT devices is fueling the need to modernize data infrastructure to meet heightened regulatory and compliance requirements. Modern data architectures have minimized the impact of data silos, promoting data lineage and governance and presenting opportunities for data democratization and monetization.

Providers are constantly innovating and developing frameworks, accelerators, simulation models and customizable AI solutions to automate insights generation. They are emphasizing model monitoring and development through emerging techniques such as AutoML, MLOps and TinyML, making AI more integrated and efficient within business workflows.

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following six quadrants: Data Science and AI Services - Large, Data Science and AI Services - Midsize, Data Modernization Services - Large, Data Modernization Services - Midsize, Advanced BI and Reporting Modernization Services - Large, Advanced BI and Reporting Modernization Services - Midsize.

This 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 U.S. market

This ISG Provider Lens™ study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

Provider Classifications

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

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Provider Classifications: Quadrant Key

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

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

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

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

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

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

Data Science and AI Services - Large

Who Should Read This Section

In this quadrant, ISG evaluates provider portfolios offering advisory and system integration services based on data science. Providers offer services to integrate scientific methods with their clients' business context, incorporate GenAI into comprehensive AI strategies and align enterprises' objectives with GenAI capabilities.

A rapidly evolving technological landscape, increasing data complexities and the need for effective governance have created the demand to implement effective data strategies across enterprises. Data-driven methodologies and the integration of advanced technologies are the top priorities of these enterprises to overcome operational challenges, reduce costs and enhance overall business performance. They are increasingly recognizing the need for adaptability and strategic use of data science and AI to stay competitive in a rapidly evolving market landscape.

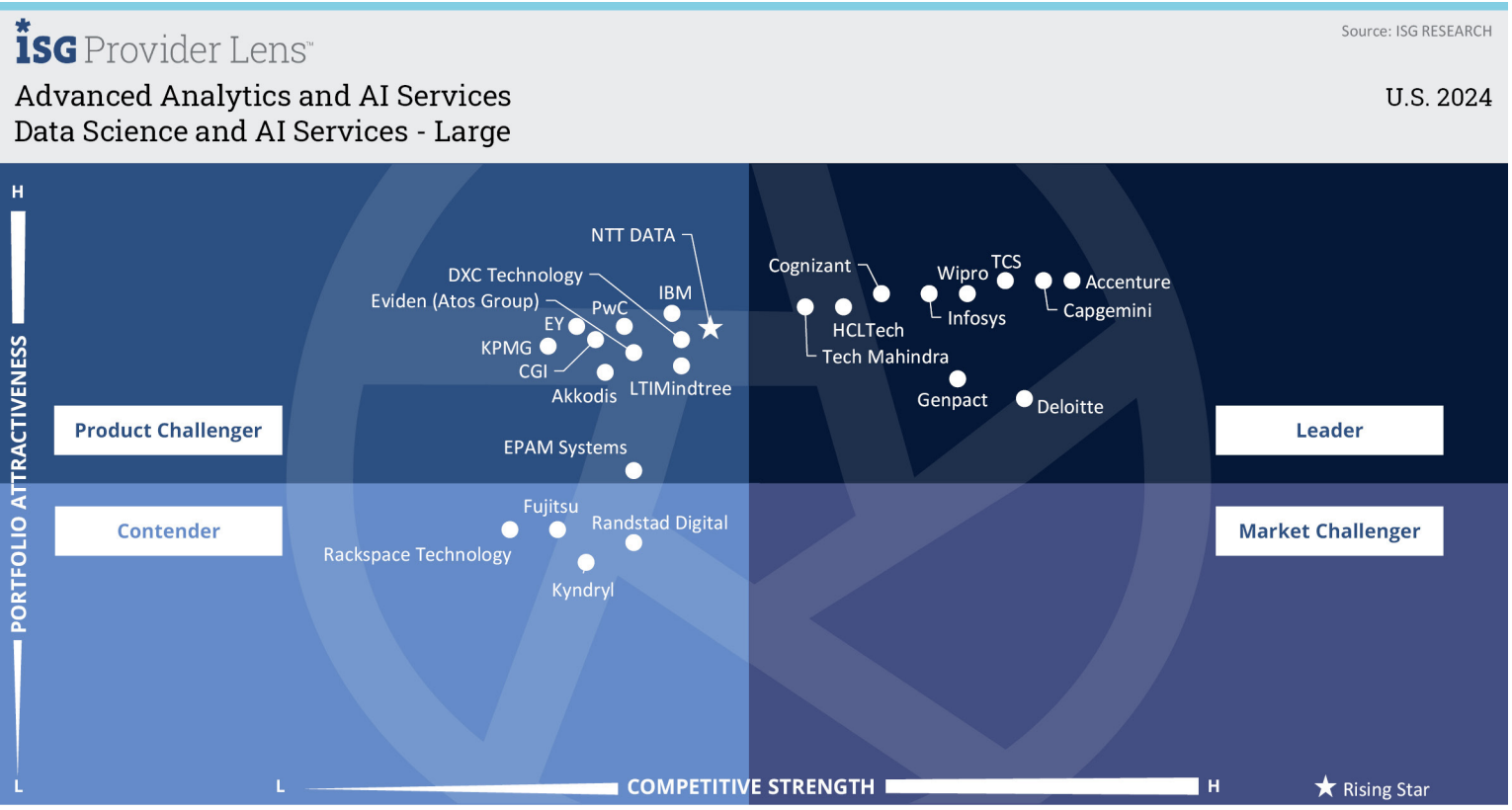
Service providers provide solutions to address enterprises' needs using AI and ML to derive insights, automate processes and enhance decision-making. They offer comprehensive AI solutions and frameworks enabling enterprises to implement and scale AI efficiently across industries. GenAI adoption has significantly increased, critical in improving data processing efficiency and providing valuable insights. Providers are using frameworks and accelerators to enhance CX, expedite time-to-market and facilitate rapid insight-driven decisions. They use MLOps to efficiently scale AI and analytics. With the growing number of GenAI and AI use cases, it has become important to adhere to regulations to ensure transparency, fairness and accountability in AI processes and outcomes.

Chief data and AI officers should use this report to explore providers that can help build data strategies, ensuring proper data governance and AI implementation to use data in AI and ML solutions.

LoB managers should read this report to gain insights into providers that can assist in developing and managing ML solutions, aligning with business goals and requirements.

Chief information and compliance officers should read this report to identify providers that enable AI and ML adoption, improving data integrity and scalability within enterprises' information systems.

Research and innovation professionals should read this report to understand IP assets, such as prebuilt solutions, and the potential application of AI and ML in automating processes and use cases.



This quadrant assesses large service providers **with expertise in scientific techniques** and **advanced technologies, such as AI and ML,** that help large enterprises gain **insights and intelligence to drive decision-making** and achieve transformational value.

Gowtham Kumar Sampath

Definition

In this quadrant, ISG has evaluated provider portfolios offering advisory and system integration services based on data science. Providers qualifying for this quadrant offer services to integrate scientific methods with business context for their clients. As GenAI gains prominence, providers should help enterprises incorporate it into their comprehensive AI strategies and align their organizational objectives with GenAI capabilities. These providers address critical business challenges by combining domain knowledge and expertise in clients' industries, enabling substantial, data-driven business growth through actionable insights. Data science can even lead to new business models and revenue streams. The objective is to define and deploy contextual questions to extract relevant information from vast data streams, leveraging both structured and unstructured data.

Service providers evaluated in this study need to address enterprise requirements, including consulting, identifying business use cases, and developing statistical models and algorithms. They should be capable of modeling and customizing ML algorithms and workflows using advanced solutions to deploy their services efficiently. Providers should exhibit end-to-end capabilities in architecting, implementing, deploying and scaling enterprise-wide AI projects. They should also offer support and training services as standalone offerings, distinct from other service contracts.

Eligibility Criteria

1. Provide a **structured approach, framework and service portfolio** with proprietary offerings, including, but not limited to, **industrialized playbooks, AI and ML platforms, accelerators, advanced automation and workbenches**
2. Demonstrate established competence with a team of **data science experts,** delivering services with an **in-depth understanding of market dynamics, regulatory requirements,** and the **specific language** necessary for successfully delivering these services
3. Possess **technology expertise and business knowledge** of region- and **industry-specific** requirements, along with **statistical and mathematical modeling capabilities,** and provide independent advisory services
4. Possess expertise and offer solutions for **federated learning, data literacy** and **advanced analytics,** including computer vision, audio processing, NLP, NLG and graph DB

Observations

Large providers in the data science market are characterized by their comprehensive and end-to-end capabilities across data modernization, analytics and AI solutions. Large providers in the data science space are distinguished by their capacity to offer end-to-end services spanning strategy and consulting to implementation and ongoing optimization. Their strength lies in integrating advanced AI capabilities, including LLMs, with robust data management frameworks that ensure data governance, security and compliance. These providers also prioritize building long-term partnerships with their clients by offering customized solutions that align with each organization's unique business goals and technical requirements.

Investing in frameworks and accelerators allows providers to streamline the deployment of data-driven solutions while ensuring clients can use the latest advancements in ML, automation and analytics. These providers often boast deep industry expertise, reflected in their ability to offer industry-specific solutions that help enterprises maximize the business impact of their data. By focusing on building and refining accelerators, they offer faster time to market for AI and data science solutions, enabling businesses to quickly realize the benefits of their data modernization efforts.

This holistic approach ensures enterprises have the guidance and tools they need to make data-driven decisions, ultimately improving operational efficiency and supporting the growth of innovative and data-centric business models.

From the 77 companies assessed for this study, 25 qualified for this quadrant, with ten being Leaders and one Rising Star.

accenture

Accenture employs a highly verticalized strategy to enhance overall business performance by integrating technology, innovation, service delivery and process efficiency while driving responsible outcomes grounded in strong compliance initiatives.

Capgemini

Capgemini's establishment of frameworks such as AI Glassbox ensures explainability and accountability across the model lifecycle, positioning it as a reliable partner for enterprises prioritizing governance and innovation.

cognizant

Cognizant incorporates GenAI into platforms such as Neuro® AI and supports model deployment with the Cognizant® Data and Intelligence Toolkit (CDIT), providing an integrated approach that meets the growing demand for comprehensive analytics services.

Deloitte.

Deloitte's data science and AI offerings strongly align with diverse enterprise needs, supporting clients from readiness assessments to ongoing optimization. This integrated approach enables effective digital transformation and cross-industry innovation.

genpact

Genpact provides a wide array of services, guiding clients through diverse stages of data engagement. Its focus on augmented intelligence enhances operational efficiency and promotes a strategic alignment between analytics and business transformation.

HCLTech

HCLTech differentiates itself in the market by skillfully merging advanced technology domains such as GenAI, quantum computing and 5G into cohesive business solutions. This strategy empowers organizations to effectively embrace AI, ensuring industry relevance.

Infosys®

Infosys' approach to data science and AI is distinguished by its AI-first strategy. Its five strategic pillars and more than 12,000 AI use cases ensure comprehensive AI integration across business functions, showcasing a commitment to scaling AI across industries.

TCS' expansive data science and AI offerings cover key domains such as cloud-based strategies, cognitive AI and GenAI. With frameworks such as the Data Intelligence Impact Cube, it facilitates seamless data migration and maturity assessment.

Tech Mahindra's data science and AI offerings focus on xperiment as a service (XaaS). Its Generative AI Center of Excellence emphasizes specialized solutions such as verticalized small language models (SLMs) and co-created GenAI models.

Wipro's offerings are expansive, covering advisory services, algorithm development and operationalization. Its portfolio focuses on Gen AI applications across more than 20 industries, addressing diverse client needs and demonstrating a commitment to industry-specific AI solutions.

NTT DATA's (Rising Star) unique approach integrates consulting and operational execution, allowing clients to navigate complex data and AI initiatives with a cohesive and adaptable strategy that addresses immediate and long-term business objectives.

Data Science and AI Services - Midsize

Who Should Read This Section

In this quadrant, ISG evaluates provider portfolios offering advisory and system integration services based on data science. Providers offer services to integrate scientific methods with their clients' business context, incorporate GenAI into comprehensive AI strategies and align enterprises' objectives with GenAI capabilities.

Enterprises seek tailored AI solutions that meet specific industry needs. They need AI solutions that provide insights and support decision-making processes, necessitating robust and scalable AI architectures. There is a growing interest in integrating LLMs into existing data science and AI workflows. Enterprises are exploring opportunities associated with GenAI to enhance various business functions, including content creation, customer service and product development. As the demand for AI and GenAI grows, data privacy and security concerns increase, highlighting the necessity for well-regulated and governed AI solutions.

Enterprises embarking on their data and analytics journey prioritize MLOps strategically as it enables improved efficiency, agility and predictability in managing their data ecosystems and business processes. A holistic approach involving technology integration and establishing governance is vital for maximizing business value through these transformations. Enterprises benefit from comprehensive assessments and strategic roadmaps for AI and ML initiatives, addressing challenges related to infrastructure readiness, aligning use cases with business goals and achieving better efficiency and cost reductions. Providers should deliver tangible business results using their IPs and tailoring AI- and ML-based models to meet specific industry needs.

Chief data and AI officers should use this report to explore providers that can help build data strategies, ensuring proper data governance and AI implementation for using data in AI and ML solutions.

LoB managers should read this report to gain insights into providers that can assist in developing and managing ML solutions that align with their business goals and requirements.

Chief information and compliance officers should read this report to discover providers enabling AI and ML adoption, focusing on improving data integrity and scalability within enterprises' information systems.

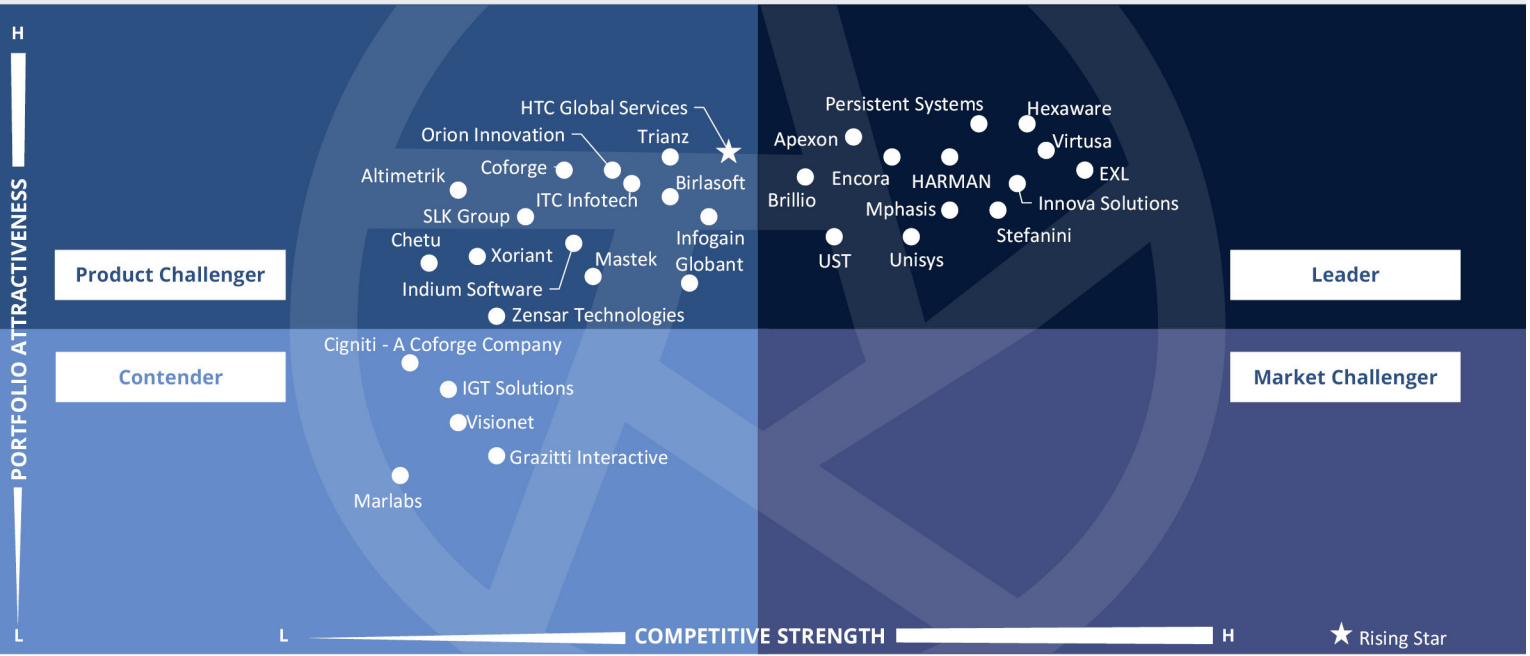
Research and innovation professionals should read this report to understand the IP assets, such as prebuilt solutions, and the potential application of AI and ML in automating processes and use cases.

ISG Provider Lens™

Source: ISG RESEARCH

Advanced Analytics and AI Services
Data Science and AI Services - Midsize

U.S. 2024



This quadrant assesses large service providers **with expertise in scientific techniques** and **advanced technologies, such as AI and ML,** that help large enterprises gain **insights and intelligence to drive decision-making** and achieve transformational value.

Gowtham Kumar Sampath

Definition

In this quadrant, ISG evaluates the provider portfolios offering advisory and system integration services based on data science. Providers qualifying for this quadrant offer services to integrate scientific methods with business context for their clients. As GenAI gains prominence, providers should help enterprises incorporate it into their comprehensive AI strategies and align their organizational objectives with GenAI capabilities. These providers address critical business challenges by combining domain knowledge and expertise in clients' industries, enabling substantial, data-driven business growth through actionable insights. Data science can even lead to new business models and revenue streams. The objective is to define and deploy contextual questions to extract relevant information from vast data streams, leveraging both structured and unstructured data.

Service providers evaluated in this study need to address enterprise requirements, including consulting, identifying business use cases, and developing statistical models and algorithms. Providers should exhibit end-to-end capabilities in architecting, implementing, deploying and scaling enterprise-wide AI projects. They should also offer support and training services as standalone offerings, distinct from other service contracts.

Eligibility Criteria

1. Provide a **structured approach, framework and service portfolio** with proprietary offerings, including, but not limited to, **industrialized playbooks, AI and ML platforms, accelerators, advanced automation and workbenches**
2. Possess **technology expertise and business knowledge** of region- and **industry-specific** requirements, along with **statistical and mathematical modeling capabilities,** and provide independent advisory services
3. Demonstrate established competence with a team of **data science experts,** delivering services with an **in-depth understanding of market dynamics, regulatory requirements,** and the **specific language** necessary for successfully delivering these services
4. Possess expertise and offer solutions for **federated learning, data literacy** and **advanced analytics,** including computer vision, audio processing, NLP, NLG and graph DB

Observations

Midsize providers in the data science market offer a distinctive blend of specialized expertise, flexibility and agility in delivering data-driven solutions. These providers typically focus on providing customized and high-quality services across data analytics, AI and data science, focusing on helping clients build and optimize their data ecosystems. Unlike the large players, midsize providers are often nimbler and more responsive, allowing them to deliver solutions tailored to their clients' specific needs and unique challenges. This adaptability is supported by investments in frameworks and accelerators that enable midsize providers to streamline their offerings, reduce implementation time and drive measurable business outcomes.

While midsize providers may not have the same extensive global reach or resources as large players, they often make up for it with their extensive technical expertise and personalized approach. Many have honed their focus on specific industries or niche markets, developing specialized tools and accelerators that address industry-specific challenges. Their ability to innovate quickly and align solutions with their clients' needs positions them as valuable partners in data modernization and advanced analytics projects.

In terms of capabilities, providers are investing in advanced AI technologies such as ML, data visualization and predictive analytics, often focusing on providing specialized and hands-on support for their clients. This approach ensures they can implement large-scale solutions and help organizations evolve and mature their data capabilities.

From the 77 companies assessed for this study, 33 qualified for this quadrant, with 13 being Leaders and one Rising Star.

Apexon

Apexon has established a comprehensive range of advanced analytics and AI services, anchored by the innovative Genysys platform. Its unique incorporation of GenAI allows for tailored solutions that effectively serve diverse industries, including BFSI and healthcare.

Brillio

Brillio's data and AI practice demonstrates a comprehensive range of capabilities, including specialized solutions via their Cloud and AI Studio and industry-specific offerings that support clients' data journeys from strategy through implementation to ongoing management.

Encora

Encora empowers business stakeholders to foster a culture of continuous innovation within their organizations. This support facilitates accelerated value delivery while minimizing potential risks during large-scale implementations.

EXL

EXL's AI-driven solutions, such as Transaction Insight and Document Fraud, are designed to enhance operational efficiency and prevent fraud. These solutions are part of EXL's strategic focus on leveraging AI to deliver transformative outcomes for clients.

HARMAN

HARMAN Digital Transformation Solutions' MLOps framework helps develop, deploy and manage ML solutions in production. It focuses on next-generation capabilities such as automated content generation and multimedia analytics, setting new industry best practices.

HEXAWARE

Hexaware offers a multifaceted suite of data science and AI technologies through its Decision Sciences Lab. This integrative approach allows IT to effectively serve various industries, maintaining flexibility in deployment through cloud-agnostic strategies.

Innova Solutions

Innova Solutions provides a holistic suite of services in data science and AI, focusing on pivotal areas such as predictive modeling, data integration, AI ethics, NLP and BI solutions, focusing on the need for reliable data foundations.

Mphasis' application development and data science offerings integrate design thinking and advanced AI solutions to enhance user experiences across industries. Mphasis addresses high-impact industry challenges with platforms such as NeoCrux designed for financial services.

Persistent Systems' Data Experience Hub (DxH) includes preintegrated accelerators that streamline model development and operationalization while ensuring ethical practices. Its iAURA platform converts enterprise data into actionable insights.

Stefanini's centralized AI division enables seamless integration across business units, supporting a unified strategy while leveraging globally distributed teams for R&D and product development and delivery, ensuring faster innovation cycles.

Unisys emphasizes delivering measurable business outcomes through its tailored solutions, underscoring its commitment to aligning technology initiatives with client objectives and achieving a substantial impact on operational efficiency and strategic growth.

UST's collaborations with prestigious academic institutions such as MIT CSAIL and Stanford SAIL Labs bolster its unique capabilities, allowing it to tailor innovative solutions such as machine comprehension and augmented intelligence for various business challenges.

Virtusa's Helio suite and applied AI services present a comprehensive range of solutions integrating generative and applied AI technologies. Its holistic approach, combining platforms, accelerators and consulting, caters to diverse industries and specific enterprise needs.

HTC Global Services (Rising Star) is dedicated to ethical AI practices through its MAGE Responsible AI framework. Its proactive mechanisms for bias identification and integration of human-in-the-loop systems ensure accountability in AI decision-making processes.

Leader

"Unisys empowers organizations to use data responsibly by balancing advanced AI capabilities with rigorous data stewardship and commitment to ethical AI, driving strategic growth and operational clarity in complex digital environments."

Gowtham Kumar Sampath

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees across 48 offices in 22 countries. In FY23 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys' data science and AI offerings integrate comprehensive analytics capabilities with cutting-edge GenAI solutions, enabling organizations to harness real-time insights, predictive modeling and responsible AI practices. Unisys delivers tailored solutions that seamlessly adapt to evolving technologies and industry-specific requirements through its vendor-agnostic and agile AI framework.

Strengths

End-to-end AI and data science solutions: Unisys' vendor-agnostic framework provides holistic solutions that span the entire data lifecycle, including data stewardship and governance. This comprehensive approach enables clients to navigate AI and analytics transformations with minimal disruption, unlike providers focusing only on isolated aspects of data science.

Ethical AI and data stewardship: Unisys' commitment to ethical AI practices helps embed responsible data use and compliance into its offerings. This proactive stance on ethical AI resonates with today's regulatory and societal expectations, providing clients with the assurance of responsible and secure data management in complex environments.

Adaptable solutions: Unisys addresses clients' diverse analytics maturity levels through scalable solutions and a structured data governance model. By supporting gradual transitions toward advanced analytics, Unisys enables businesses at different stages of analytics maturity to harness data science effectively.

Next-generation AI capabilities: The Unisys Artificial Intelligence CoE helps the company to develop best practices and stay at the forefront of AI innovation. This commitment to next-generation AI and continual advancement enables it to offer clients cutting-edge solutions that evolve with emerging technologies.

Caution

Unisys should consider promoting and enhancing its streaming and real-time analytics capabilities to meet the rising need for real-time insights in fast-paced industries. Expanding resources to support industry-specific compliance will ensure Unisys can respond dynamically to regulatory shifts.

Data Modernization Services - Large

Who Should Read This Section

From data migration to management, ISG assesses data modernization services providers offering end-to-end services in this quadrant. These services aim to transform legacy systems into modern and cloud-based platforms.

Enterprises are increasingly transforming their data infrastructure to be more agile, scalable and secure. This involves migrating legacy systems to cloud-based or hybrid environments, enabling better data integration, storage and management. The objective of modernization is significant storage-related cost reduction and system maintenance while increasing performance and scalability. With large data volumes, managing data across systems is complex. Data observability monitoring tools help data management by enabling end-to-end data visibility and monitoring across systems. To address these challenges, enterprises seek flexible data management solutions as data continues to sprawl across disparate destinations.

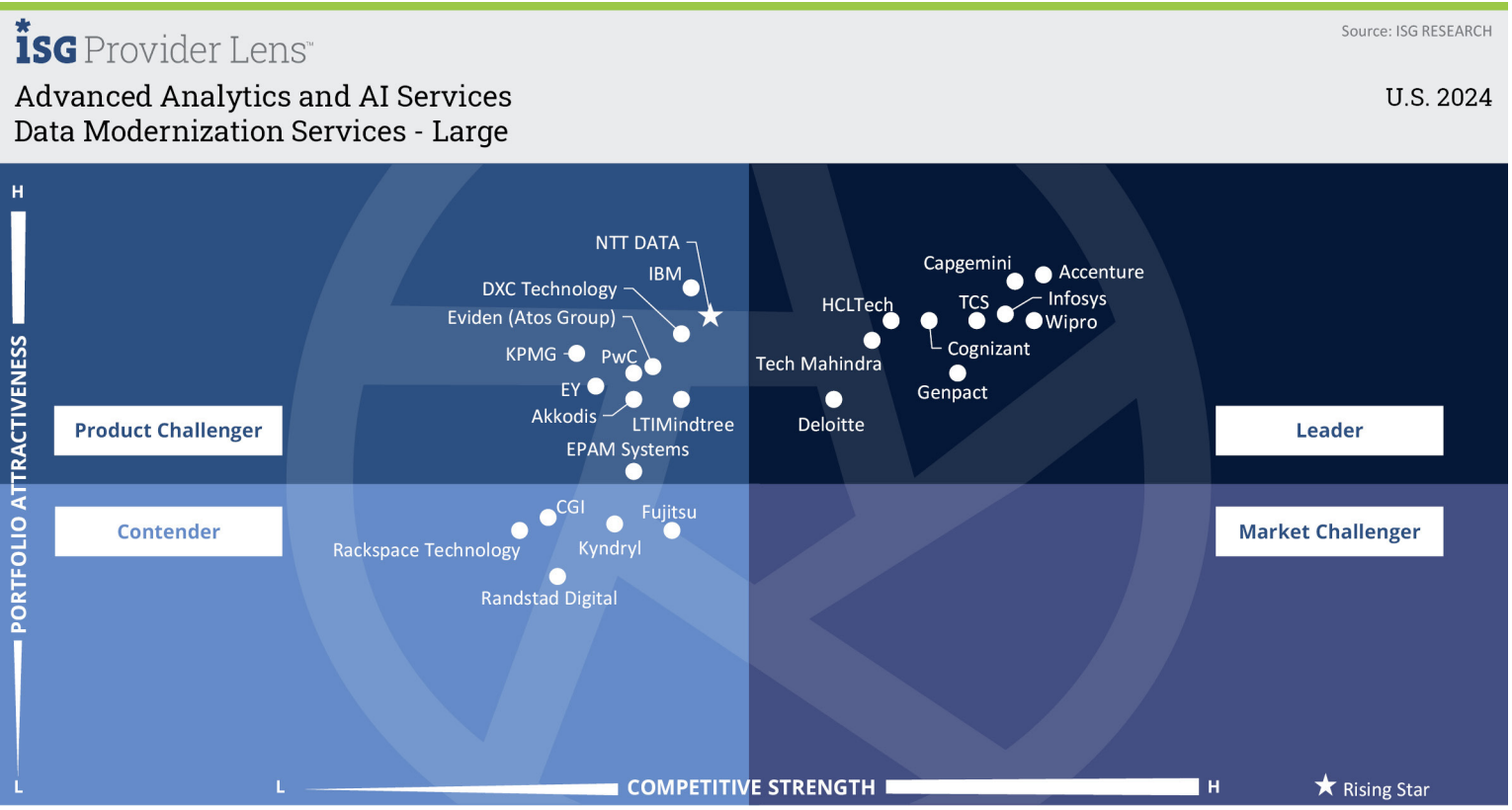
Establishing data governance is becoming essential for enterprises to meet regulatory expectations, ensure data quality and promote transparency across various data domains. Providers are using AI-driven automated tools and accelerators and providing custom services to significantly simplify the migration process from legacy systems to modern architectures, leading to substantial time and cost savings. They are establishing data fabric and other innovative data architecture that can address the growing complexity of data integration by seamlessly connecting disparate data sources. Providers should assist enterprises in implementing robust master data management to ensure data accuracy and quality, addressing inefficiencies and enhancing operational performance.

Chief data officers can read this report to gain perspective on providers' analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes.

Data management professionals should read this report to understand providers' relative positioning and capabilities to implement and maintain compliance and governance standards.

Chief information and compliance officers should use this report to discover providers enabling AI and ML adoption, focusing on improving data integrity and scalability within enterprises' information systems.

Technology professionals should read this report to understand value propositions and providers' competencies in delivering seamless solutions that use data, AI and analytics.



This quadrant assesses large service providers that offer services for **modernizing data ecosystems,** including **data architectures,** pipelines, data models and also provides **data governance** to ensure regulatory compliance while **improving data quality and security.**

Gowtham Kumar Sampath

Definition

In this quadrant, ISG has assessed providers in the data modernization services category, offering end-to-end services from data migration to management. These services aim to transform legacy systems into modern, cloud-based platforms. They encompass data engineering, utilization of modern data management tools and governance practices to ensure the delivery of high-quality, actionable data.

Providers evaluated in this quadrant should offer comprehensive consulting services, including assessment, strategy formulation and the creation of modernization roadmaps. These services encompass designing scalable data architectures, analyzing data landscapes, developing business cases and managing data lifecycles. Providers should offer data migration services, including the transfer of data to cloud platforms and executing data transformations such as cleansing and ETL operations. They should possess expertise in building data pipelines, integrating diverse datasets, and establishing modern data lakes and warehouses for centralized data storage. Providers should also help streamline change management and improve data delivery through DataOps.

Providers' offerings should include workflow management, data modeling, data integration, master data management, metadata management and data lineage services. It is crucial for them to establish data governance strategies to uphold compliance with regulatory standards. This involves developing and implementing data governance systems, policies, and procedures to ensure effective and efficient data management. Their portfolio should include services focused on ensuring data quality, enhancing data security and control, establishing and managing data lakes, and complying with regulations such as GDPR.

Eligibility Criteria

1. Demonstrate expertise in technology and **architectural consulting** for assessment, strategy, roadmap, and **lifecycle** and **workflow management**
2. Provide **standardized/customized frameworks and platforms** for data aggregation and cleansing
3. Integrate systems via APIs, deploy **real-time data solutions,** and establish data lakes and warehouses
4. **Possess industry knowledge** and **data management and governance** capabilities to deliver data estate modernization
5. Have experience in **building data hubs, data fabrics and modular data lakes; multicloud data integration capabilities;** and access to partner data ecosystem
6. Establish **data governance strategies/best practices** and continuously ensure **data quality and security**
7. Track complete **data lineage** back to its original source to ensure integrity and accuracy throughout its lifecycle
8. Have **data engineering specialists** across regional markets

Observations

Large providers in the data modernization market are defined by their ability to offer comprehensive and end-to-end solutions that span the full spectrum of data transformation needs. These providers typically have extensive global reach, advanced technological capabilities and significant investments in state-of-the-art frameworks and accelerators. Their vast resources enable them to deliver large-scale data modernization projects that integrate seamlessly with complex enterprise infrastructures. By focusing on cutting-edge technologies such as AI, ML and cloud computing, they can help organizations modernize their data management practices, ensuring improved efficiency, scalability and flexibility across their data ecosystems.

Large providers can invest heavily in innovation, continuously developing new solutions to meet the evolving needs of the data modernization landscape. Their investment in specialized accelerators and frameworks speeds up the implementation of data modernization solutions, driving faster time-to-value for their clients. With strong capabilities in AI-powered analytics, data quality management and security, large providers offer businesses the tools to better harness and analyze their data for strategic decision-making. This includes providing advanced data analytics capabilities, building comprehensive data lakes and offering integrated solutions that streamline the data pipeline from ingestion to reporting. These providers are particularly effective at helping organizations migrate to cloud-based architectures, implement robust data governance frameworks and optimize data integration across diverse platforms.

From the 77 companies assessed for this study, 25 qualified for this quadrant, with ten being Leaders and one Rising Star.

accenture

Accenture's service portfolio in data modernization showcases extensive capabilities, positioning the company as a market leader. Its strategic partnership with Google Cloud enhances scalability and performance, differentiating its offerings in a competitive landscape.

Capgemini

Capgemini's vast capabilities in data engineering include solutions such as IDEA by Capgemini, which aims to modernize data estates rapidly and effectively. This capability rivals or exceeds competitors' offerings by providing a flexible architecture that scales with client needs.

cognizant

Cognizant boasts a unique service portfolio ranging from data modernization to advanced analytics and AI services. It demonstrates a strong commitment to innovation and collaboration, distinguishing it from competitors focusing on specific niches.

Deloitte.

Deloitte's Migration Factory approach for seamless cloud migration offers a structured model to optimize transition, mitigating operational risks associated with legacy technologies while catering to the immediate technological needs of organizations.

genpact

Genpact offers DataOps services, including the PowerMe platform, for data observability and governance, signifying advanced capabilities. This platform uses active metadata to provide insights into data lineage and quality, setting a high bar for data management solutions.

HCLTech

HCLTech's Business Driven Approach using Data First strategy prioritizes transforming data platforms into future-ready and responsive environments capable of delivering real-time intelligence.

Infosys

Infosys' data engineering capabilities include specialized platforms such as SmartDQ for data quality and Data Operations Workbench for operational monitoring of data environments. These tools, designed to ensure high-quality data delivery, emphasize DataOps principles.

TCS' modern data mesh architecture promotes decentralized data ownership and management, effectively allowing organizations to treat data as a product. It uses Microsoft Cloud technologies to deliver industry-specific challenges while facilitating real-time data access.

Tech Mahindra distinguishes itself with solutions such as DMX, a multi-industry data marketplace facilitating data exchange and monetization while ensuring compliance with privacy laws, generating new value streams and broadening the horizon for data utilization.

Wipro employs various proprietary frameworks and tools, such as WDIS and Metromap AI, to enhance data engineering capabilities. These tools support structured data transformations and cloud migration while embedding AI and ML functionalities.

NTT DATA's (Rising Star) Decision Architecture framework enhances traditional analytics by focusing on decision-driven approaches and transforming complex data into actionable insights that shift from reactive to proactive enterprise decision-making.

Data Modernization Services - Midsize

Who Should Read This Section

From data migration to management, ISG assesses data modernization services providers offering end-to-end services in this quadrant. These services aim to transform legacy systems into modern and cloud-based platforms.

Enterprises are increasingly focused on building, managing and governing modern data ecosystems to unlock data value and empower business users with real-time data access for informed decision-making. To achieve scalability and cost efficiency, enterprises migrate data to cloud platforms and adopt hybrid models. However, challenges arise from the complexities of migrating legacy systems to modern platforms, such as Snowflake, especially in preserving essential metadata and minimizing disruption. A structured approach is necessary to maintain master data and ensure quality and efficiency in data access.

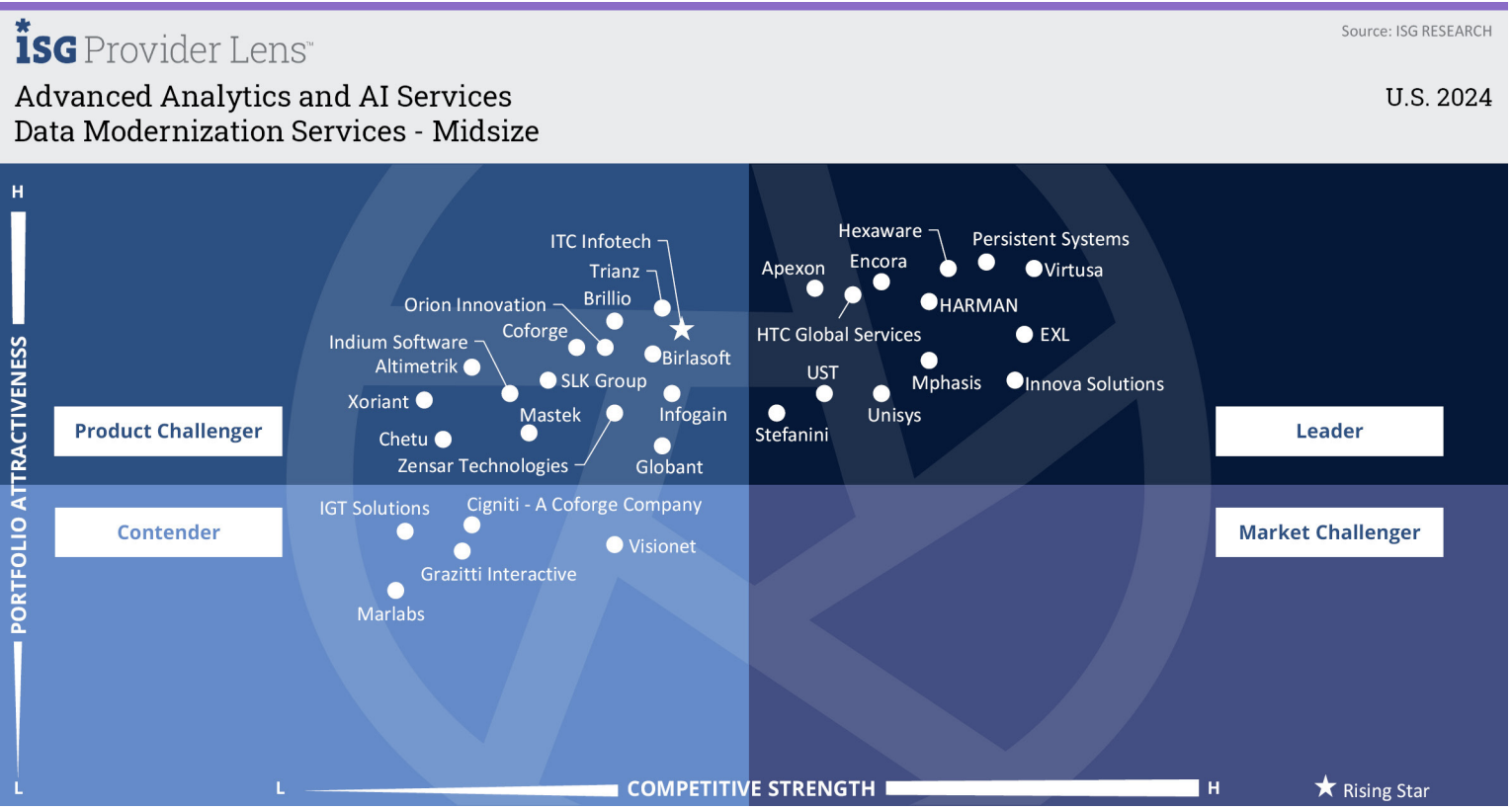
Providers are using AI-driven tools to automate data tasks such as cleansing, integration and governance, thereby enhancing data quality and reducing manual intervention. Advanced technologies, including NLP and GenAI, are also used to automate and streamline the migration process. Moreover, enterprises are adopting data fabric and data mesh architecture to effectively tackle the intricacies of data integration by seamlessly connecting disparate data sources. As data governance becomes increasingly vital, providers are helping enterprises establish robust data governance frameworks to ensure data compliance, accuracy and reliability across the organization.

Chief data officers can refer to this report to gain perspective on effective analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes.

Data management professionals should read this report to understand providers' relative positioning and capabilities to implement and maintain compliance and governance standards.

Chief information and compliance officers should read this report to discover providers enabling AI and ML adoption, focusing on improving data integrity and scalability within enterprises' information systems.

Technology professionals should read this report to understand value propositions and providers' competencies in delivering seamless solutions using data, AI and analytics.



This quadrant assesses large service providers that offer services for **modernizing data ecosystems,** including **data architectures,** pipelines, data models and also provides **data governance** to ensure regulatory compliance while **improving data quality and security.**

Gowtham Kumar Sampath

Definition

In this quadrant, ISG assesses providers in the data modernization services category, offering end-to-end services from data migration to management. These services aim to transform legacy systems into modern, cloud-based platforms. They encompass data engineering, utilization of modern data management tools and governance practices to ensure the delivery of high-quality, actionable data.

Providers evaluated in this quadrant should offer comprehensive consulting services, including assessment, strategy formulation and the creation of modernization roadmaps. These services encompass designing scalable data architectures, analyzing data landscapes, developing business cases and managing data lifecycles. Providers should offer data migration services, including the transfer of data to cloud platforms and executing data transformations such as cleansing and ETL operations. They should possess expertise in building data pipelines, integrating diverse datasets, and establishing modern data lakes and warehouses for centralized data storage. Providers should also help streamline change management and improve data delivery through DataOps.

Providers' offerings should include workflow management, data modeling, data integration, master data management, metadata management and data lineage services. It is crucial for them to establish data governance strategies to uphold compliance with regulatory standards. This involves developing and implementing data governance systems, policies, and procedures to ensure effective and efficient data management. Their portfolio should include services focused on ensuring data quality, enhancing data security and control, establishing and managing data lakes, and complying with regulations such as GDPR.

Eligibility Criteria

1. Demonstrate expertise in technology and **architectural consulting** for assessment, strategy, roadmap, and **lifecycle** and **workflow management**
2. Provide **standardized/customized frameworks and platforms** for data aggregation and cleansing
3. Integrate systems via APIs, deploy **real-time data solutions,** and establish data lakes and warehouses
4. **Possess industry knowledge** and **data management and governance** capabilities to deliver data estate modernization
5. Have experience in **building data hubs, data fabrics and modular data lakes; multicloud data integration capabilities;** and access to partner data ecosystem
6. Establish **data governance strategies/best practices** and continuously ensure **data quality and security**
7. Track complete **data lineage** back to its original source to ensure integrity and accuracy throughout its lifecycle
8. Have data **engineering specialists** across regional markets

Observations

Midsize providers in the data modernization market distinguish themselves by offering specialized, highly focused solutions that cater to the evolving needs of enterprises undergoing digital transformation. These providers excel in providing customized data modernization services, with a strong emphasis on helping organizations update and optimize their data ecosystems to support the growing demands of the digital age. With a focus on operational efficiency, midsize providers invest in frameworks and accelerators that streamline the implementation of data modernization solutions. This investment enables them to deliver fast and effective results without compromising quality, often allowing for a more personalized offering.

Midsize providers focus on industries or specific aspects of data modernization that enable them to create targeted solutions and collaborate closely with customers, offering a tailored approach to data governance, data integration and cloud migration. Their deep knowledge in specific sectors allows them to offer more refined and industry-specific accelerators and frameworks that facilitate a smoother and more efficient data modernization journey.

Midsize providers are also notable for their ability to combine innovative technologies, such as AI-driven analytics and ML, with strong data management practices. They focus on creating scalable, secure and flexible data architectures that help businesses integrate and manage their data across various environments. By using modern tools and platforms, midsize providers can help clients address data silos, optimize data quality and ensure compliance with evolving data regulations.

From the 77 companies assessed for this study, 33 qualified for this quadrant, with 13 being Leaders and one Rising Star.

Apexon

Apexon enhanced its data modernization capabilities with cloud-native implementations and AI-driven solutions, ensuring scalable and flexible service delivery. Integrating real-time analytics and customizable visualization tools empowers organizations to make informed decisions.

Encora

Encora employs agile frameworks for quick and efficient deployment alongside a modular strategy that enables customized and scalable solutions to tackle challenges such as data fragmentation through integrated data warehouses.

EXL

EXL's acquisition of ITI Data helps integrate specialized expertise in data management, governance and compliance, boosting its ability to handle complex data environments and enabling clients to achieve reliable and actionable insights from their data.

HARMAN

HARMAN Life-ware.AI facilitates scalable and extensible cloud-to-edge AI implementations using patented technologies and customizable models supported by an accelerated MLOps toolchain.

HEXAWARE

Hexaware uses advanced tools to facilitate efficient data engineering processes, including the Data Wiki Solution for enhanced data quality analysis and Amaze, which employs GenAI for data profiling.

HTC GLOBAL SERVICES

HTC Global Services uses its MAGE DataWorks platform to enhance data management capabilities, facilitating processes from data ingestion to transformation and governance while incorporating emerging technologies such as data mesh and graph databases.

Innova Solutions

Innova Solutions' data modernization approaches resonate well with industry best practices by emphasizing a business-centric viewpoint that aligns modernization efforts with specific organizational goals.

Mphasis' incorporation of pluggable decision models allows businesses to navigate heterogeneity and adapt quickly as business dynamics evolve, fostering a culture of experimentation and innovation.

Persistent Systems' integration of data modernization and advanced technologies aligns well with industry standards. Its Persistent Data Foundry provides full-fledged capabilities for data ingestion, governance and actionable insights.

Stefanini manages data migrations to cloud platforms with a strong emphasis on ETL/ELT processes and real-time data solutions. It integrates complex and diverse data sources through scalable pipelines, creating seamless data flows in multicloud environments.

Unisys' Data Modernization solutions assess existing environments, recommend appropriate strategies, and securely migrate structured, semi-structured, and unstructured data from legacy systems to enterprise data lakes or cloud databases.

UST's differentiators include their robust Comprehensive Application Modernization services, which provide a full suite of offerings from assessment to strategy development, ensuring that legacy applications are successfully migrated and optimized for cloud environments.

Virtusa's service portfolio emphasizes data infrastructure modernization in hybrid cloud and multicloud environments, uniquely integrating legacy and cloud systems. This comprehensive approach enables organizations to leverage existing investments while adopting new technologies.

ITC Infotech (Rising Star) offers data modernization, migration, data management and governance solutions, catering to verticals such as CPG, BFSI, healthcare, retail and manufacturing. It delivers tailored strategies to migrate legacy systems seamlessly to cloud-native architectures.

Leader

"Unisys' commitment to providing actionable insights and robust governance frameworks distinguishes it as a leader in transforming data into strategic assets for organizations seeking growth and innovation."

Gowtham Kumar Sampath

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees across 48 offices in 22 countries. In FY23 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys positions itself as a provider of comprehensive data analytics and management solutions, focusing on actionable insights, risk management and modernization strategies. Its unique focus on transforming data into strategic assets and its focus on governance frameworks underscores its commitment to enabling clients to harness the full value of their data.

Strengths

Holistic service portfolio: Unisys offers a comprehensive suite of services that encompasses essential areas such as data analytics, governance and modernization. This breadth allows it to address various aspects of data management effectively, ensuring organizations can use their data as a strategic asset.

Integrated approach to data analytics and governance: Unisys provides organizations with a unified framework for data management by seamlessly combining actionable insights with risk mitigation strategies. This synthesis improves the overall effectiveness of data initiatives, enhancing Unisys' ability to provide comprehensive solutions that encompass analytics and governance.

Strategic focus on data as a business asset: Unisys distinguishes itself through a strategic approach that treats data as a critical asset for business growth. Its emphasis on using data for actionable insights, along with its robust governance framework offering, enables clients to effectively harness the potential of their data.

Advanced data engineering and modernization technologies: The integration of advanced analytics capabilities and data pipeline optimization ensures that Unisys stays updated with industry standards. Unisys employs next-generation technologies such as ML and cloud computing that enhance the robustness of its solutions.

Caution

As Unisys rolls out new data management and modernization solutions, it needs to promote and create awareness around client education and support. It can empower users with comprehensive training to effectively use its solutions, ensuring successful adoption and maximizing the value derived from their data assets.

Advanced BI and Reporting Modernization Services - Large

Who Should Read This Section

In this quadrant, ISG evaluates service providers offering advanced business intelligence (BI) and reporting modernization services. These providers employ sophisticated approaches to transform raw data into actionable insights, providing intelligence beyond traditional data visualization and basic reporting.

Enterprises aim to democratize data, making it accessible at all enterprise levels to support non-technical users, fostering a data-driven culture and facilitating data-driven decision-making. They are transitioning from legacy reporting tools to modern cloud-based BI solutions such as Power BI and Tableau to reduce costs, standardize their BI and analytics platforms and move to a self-service model that enables access to non-technical users . This shift allows enhanced data management and scalability and improved reporting capabilities.

Enterprises aim to enable employees to explore data autonomously, fostering a data-driven culture and boosting data literacy across different business functions. Providers are integrating AI, GenAI and NLP into their BI strategies to offer nuanced insights, predictive modelings and real-time data consumption. These modernization efforts focus on building user-friendly interfaces and personalized dashboards for different roles and reporting tools, facilitating ease of use and accessibility for all stakeholders. Providers are equipping enterprises with effective data storytelling tools for user-friendly and impactful visualizations, transforming complex data into clear and actionable insights.

Chief data officers can refer to this report to gain perspective on effective analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes.

Technology professionals should read this report to understand value propositions and providers' competencies in delivering seamless solutions using data, AI and analytics.

Chief analytics officers (CAOs) can refer to this report to gain perspective on providers' tools and technologies for data analysis and reporting and define strategies to integrate analytics into business.

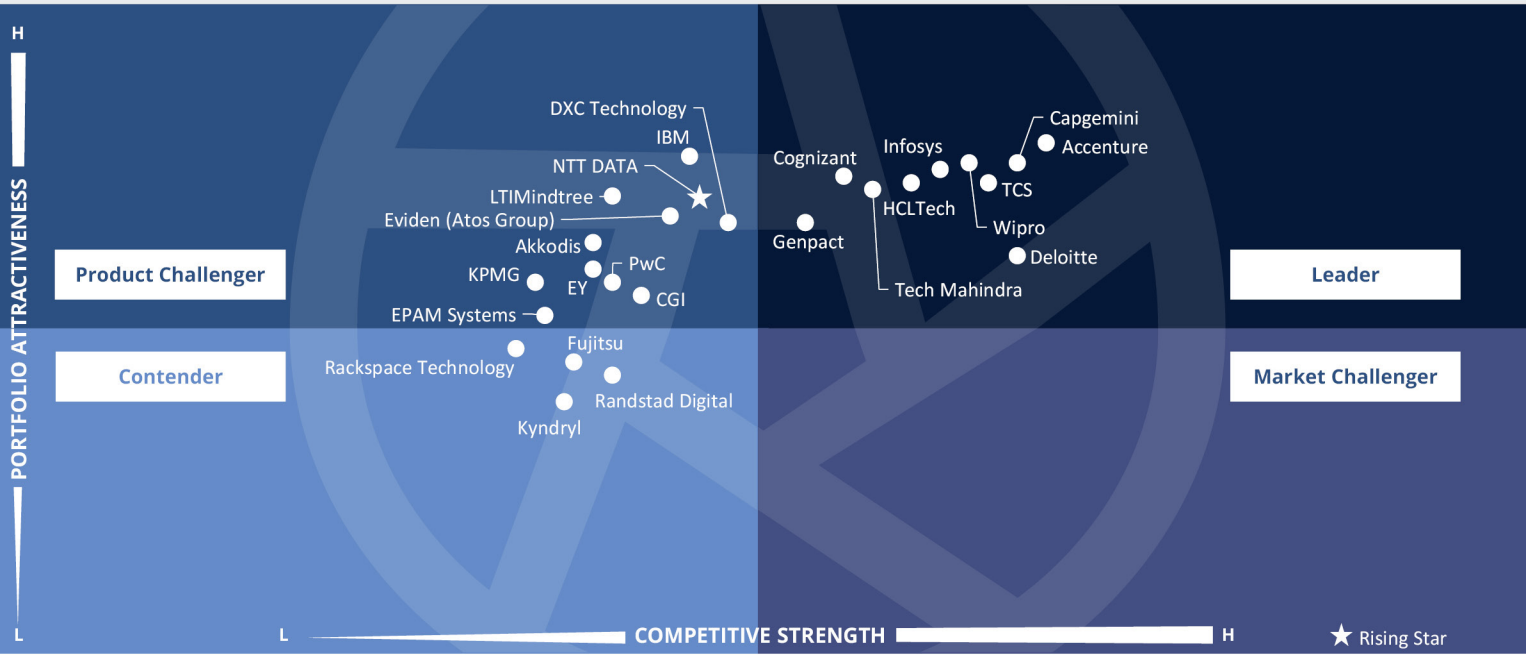
LoB managers should read this report to gain insights into providers that can assist in generating actionable insights and intelligence, aligning them with their business goals and requirements.

ISG Provider Lens™

Source: ISG RESEARCH

Advanced Analytics and AI Services
Advanced BI and Reporting Modernization Services - Large

U.S. 2024



This quadrant assesses large service providers offering **self-service analytics** to empower business users with **interactive visualizations and conversational experiences.** It also integrates **AI models** to transform raw data into actionable intelligence in real time.

Gowtham Kumar Sampath

Advanced BI and Reporting Modernization Services - Large

Definition

In this quadrant, ISG has evaluated service providers offering advanced business intelligence (BI) and reporting modernization services. These providers employ sophisticated approaches to transform raw data into actionable insights, providing intelligence beyond traditional data visualization or basic reporting. These services are vital for enterprises looking to harness data strategically, enabling business leaders to unlock its full potential.

Several trends shape the future of advanced BI and reporting services. Cloud solutions gain popularity for scalability, affordability and easy deployment. Self-service analytics empowers business users to explore data independently, fostering a data-driven culture. Integration of AI and ML automates tasks, providing real-time insights for proactive decision-making.

Providers specializing in advanced BI and reporting excel in managing large amounts of data, integrating multiple data sources, and delivering real-time, dynamic reporting crucial for strategic decision-making across organizations. They demonstrate expertise in leveraging cloud-based platforms for scalability and computational power necessary for complex analytics tasks. These providers excel in integrating and implementing sophisticated BI tools to create interactive dashboards and customized reports tailored to various stakeholders' needs. They also specialize in integrating data from diverse sources, including ERP systems, CRM platforms, social media and IoT devices.

Eligibility Criteria

1. Connect disparate data sources, cleanse and transform data, handle **complex data structures, integrate real-time and historical data** and **ensure data quality**
2. Utilize **analytics techniques, including ML, predictive modeling and statistical analysis,** to uncover hidden patterns, identify trends, and predict outcomes from historical data
3. **Tailor services/solutions to specific industry/business needs,** understanding the unique challenges and opportunities across verticals
4. **Design and deploy interactive dashboards, reports and visualizations** that communicate complex data insights to technical and non-technical audiences and create compelling data stories
5. Offer **flexible deployment options,** including **cloud-based solutions, on-premises installations, or hybrid models** tailored to existing infrastructure and security needs
6. Provide **ongoing support and training** for the effective use of BI

Observations

Large providers in the advanced BI and reporting modernization market stand out for their ability to deliver comprehensive and enterprisewide solutions that integrate advanced analytics with sophisticated reporting frameworks. These providers are characterized by their ability to offer end-to-end BI modernization services that focus beyond the technical implementation of reporting systems and provide strategic guidance that optimizes the way organizations use their data for decision-making.

Through robust investments in cloud-based platforms, AI-driven analytics and advanced ML models, they empower businesses to extract deeper insights from their data, automate reporting processes and improve overall business performance. Their accelerators and frameworks are designed for scalability and flexibility, enabling the seamless integration of various data sources and BI tools into an organization's existing infrastructure, ensuring clients can access actionable and data-driven insights more quickly and efficiently.

Large providers can drive innovation within the BI and reporting space with substantial R&D investments to help them stay ahead of market trends, continuously refining their tools and technologies to meet the evolving needs of their clients. These providers augment the capabilities of BI and reporting modernization by developing AI-powered self-service analytics platforms and cutting-edge data visualization solutions. By providing comprehensive and scalable BI solutions, large providers are well-positioned to lead the market, helping businesses optimize their reporting frameworks and turn their data into strategic assets.

From the 77 companies assessed for this study, 25 qualified for this quadrant, with ten being Leaders and one Rising Star.

accenture

Accenture's Enterprise Business Intelligence initiative establishes data-driven transformation, enhancing informed decision-making by embedding insights directly into business processes and helping organizations break down traditional data silos.

Capgemini

Capgemini employs a holistic approach to reporting services that integrate advanced analytics, ML and AI, enhancing its reporting capabilities. The establishment of more than 90 research labs enables rapid testing and application of new technologies.

cognizant

Cognizant's comprehensive suite for reporting and analytics is supported by its partnership ecosystem with leading BI technologies. Its BI Harmony tool facilitates effective report rationalization, making it easier for organizations to manage their reporting landscapes.

Deloitte.

Deloitte distinguishes itself in the analytics landscape with a holistic approach that integrates advanced analytics tailored to various business functions. It delivers actionable insights from a blend of hindsight, insight and foresight to tackle complex challenges.

genpact

Genpact's use of proprietary frameworks such as Change Lens to evaluate AI maturity and develop strategic roadmaps for clients signifies a detailed and well-informed approach to reporting.

HCLTech

HCLTech's capabilities present a multifaceted approach to advanced BI and reporting services, emphasizing collaboration, GenAI integration and customized solutions, providing a differentiated analytics experience tailored to client needs.

Infosys' integration of GenAI through its AI4BI initiative enables the addition of narratives and highlights in existing reports and dashboards, providing deeper insights into market dynamics, such as declining demand and potential cannibalization effects.

TCS integrates ML within its offerings, especially through the Smart Report Generator and real-time insights components. This approach favors TCS within a broader industry trend that recognizes the importance of AI-driven analytics to derive actionable insights.

Tech Mahindra fosters enhanced collaboration and data democratization through its visualization as a service (VaaS) framework and iDecisions platform. It enables ready-to-consume data models and user-friendly interfaces that facilitate self-service reporting.

Wipro's focus on reporting excellence is evident through its tailored reporting solutions and the Data Discovery Platform (DDP), now rebranded as Industry Business Solutions (IBS), with applications designed for CFOs, CMOs and COOs in various industries.

NTT DATA's (Rising Star) commitment to transforming complex data into intuitive visual formats facilitates quick and informed decision-making. NTT DATA ensures that data flows smoothly into visualization tools, enabling businesses to harness real-time insights.

Advanced BI and Reporting Modernization Services - Midsize

Who Should Read This Section

In this quadrant, ISG evaluates service providers offering advanced business intelligence (BI) and reporting modernization services. These providers employ sophisticated approaches to transform raw data into actionable insights, providing intelligence beyond traditional data visualization and basic reporting.

Organizations are increasingly adopting cloud-native BI tools for their scalability, flexibility and ability to provide real-time data access. There is a growing demand for data democratization that includes integrating self-service analytics capabilities into existing analytical frameworks. Enterprises need BI solutions that embed AI and ML for predictive insights, enabling proactive decision-making. Using advanced BI solutions, companies aim to enhance collaboration across business units, fostering shared insights and data-driven strategies.

Providers are incorporating technologies such as GenAI and NLP to create intuitive interfaces that facilitate easy access to actionable insights without requiring extensive technical expertise, thereby boosting accessibility and productivity. These solutions need to deliver real-time insights for quick and informed decision-making, incorporating streaming data and real-time processing into their BI systems. Enterprises prefer providers that offer collaborative tools and promote data literacy programs to empower stakeholders across the organization.

Chief data officers can read this report to gain perspective on effective analytics tools and techniques for leveraging data assets and ecosystems to deliver business outcomes.

Technology professionals should read this report to understand value propositions and providers' competencies in delivering seamless solutions that use data, AI and analytics.

Chief analytics officers (CAOs) can read this report to gain perspective on tools and technologies for data analysis and reporting and define strategies to integrate analytics into business.

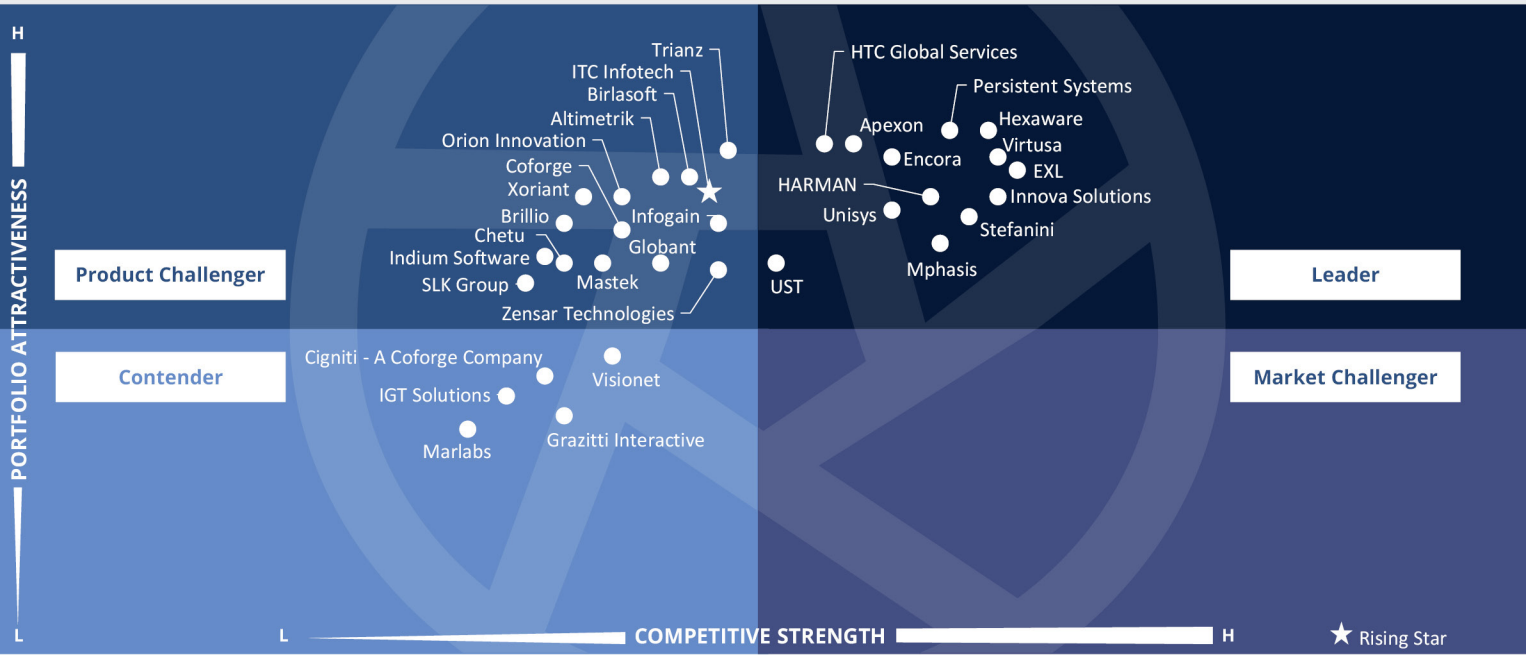
LoB managers should read this report to gain insights into providers that can assist in generating actionable insights and intelligence, aligning them with their business goals and requirements.

ISG Provider Lens™

Source: ISG RESEARCH

Advanced Analytics and AI Services
Advanced BI and Reporting Modernization Services - Midsize

U.S. 2024



This quadrant assesses large service providers offering **self-service analytics** to empower business users with **interactive visualizations and conversational experiences.** It also integrates **AI models** to transform raw data into actionable intelligence in real time.

Gowtham Kumar Sampath

Definition

In this quadrant, ISG evaluates service providers offering advanced business intelligence (BI) and reporting modernization services. These providers employ sophisticated approaches to transform raw data into actionable insights, providing intelligence beyond traditional data visualization or basic reporting. These services are vital for enterprises looking to harness data strategically, enabling business leaders to unlock its full potential.

Several trends shape the future of advanced BI and reporting services. Cloud solutions gain popularity for scalability, affordability and easy deployment. Self-service analytics empowers business users to explore data independently, fostering a data-driven culture. Integration of AI and ML automates tasks, providing real-time insights for proactive decision-making.

Providers specializing in advanced BI and reporting excel in managing large amounts of data, integrating multiple data sources, and delivering real-time, dynamic reporting crucial for strategic decision-making across organizations. They demonstrate expertise in leveraging cloud-based platforms for scalability and computational power necessary for complex analytics tasks. These providers excel in integrating and implementing sophisticated BI tools to create interactive dashboards and customized reports tailored to various stakeholders' needs. They also specialize in integrating data from diverse sources, including ERP systems, CRM platforms, social media and IoT devices.

Eligibility Criteria

1. Connect disparate data sources, cleanse and transform data, handle **complex data structures, integrate real-time and historical data,** and ensure **data quality**
2. Utilize **analytics techniques, including ML, predictive modeling and statistical analysis,** to uncover hidden patterns, identify trends, and predict outcomes from historical data
3. **Tailor services/solutions to specific industry/business needs,** understanding the unique challenges and opportunities across verticals
4. **Design and deploy interactive dashboards, reports and visualizations** that communicate complex data insights to technical and non-technical audiences and create compelling data stories
5. Offer **flexible deployment options,** including **cloud-based solutions, on-premises installations, or hybrid models** tailored to existing infrastructure and security needs
6. Provide **ongoing support and training** for the effective use of BI

Observations

Midsize providers in the advanced BI and reporting modernization market offer specialized and highly tailored solutions that cater to the specific needs of organizations looking to optimize their data reporting and analytics capabilities. These providers differentiate themselves through their ability to deliver agile, flexible and industry-focused BI solutions that help businesses improve decision-making and enhance overall operational efficiency. By investing in specialized frameworks and accelerators, midsize providers can offer advanced BI tools and reporting capabilities that streamline implementation and drive quicker time-to-value for clients. This focus on flexibility and speed makes them attractive partners for enterprises that require custom and scalable solutions.

Providers' investments in accelerators, including prebuilt reporting templates and industry-specific frameworks, allow them to deliver tailored insights and analytics that cater to the unique challenges faced by clients across various sectors.

Providers are also focused on using cutting-edge technologies, such as AI-driven analytics and cloud-based BI platforms, to enhance their reporting and visualization capabilities. They focus on providing organizations with the tools needed to transform raw data into actionable insights, driving smart business decisions. By utilizing modern technologies and streamlined processes, midsize providers can help clients optimize their data pipelines, improve data quality and enhance the effectiveness of their reporting frameworks. They play a critical role in helping organizations modernize their BI capabilities, driving significant value from data in a competitive market.

From the 77 companies assessed for this study, 33 qualified for this quadrant, with 13 being Leaders and one Rising Star.

Apexon

Apexon has strengthened its offerings through the innovative Vizsense platform, facilitating sophisticated dashboard development and real-time analytics. This move empowers organizations to derive actionable insights from complex datasets, enhancing decision-making processes.

Encora

Encora enables consumption analytics by creating persona-based visualizations, using UX design techniques to deliver insights in an as-a-service model facilitating self-service BI through the integrated data and analytics portal (iDAP).

EXL

EXL offers comprehensive reporting solutions beyond traditional analytics to provide real-time and relevant insights that inform operational decisions. It also uses cutting-edge visualization tools to create interactive dashboards and reports that simplify complex data.

HARMAN

HARMAN's data and analytics services provide a comprehensive solution for BI and reporting modernization, enabling organizations to transform data into actionable insights using extensive expertise in data engineering, analytics, data visualization and AI and ML.

HEXAWARE

Hexaware's dashboard development capabilities emphasize user interaction and customization, featuring advanced functionalities such as filters, drill-downs and hover-over effects to facilitate deeper data exploration.

HTC GLOBAL SERVICES

HTC Global Services focuses on proprietary tools such as the MAGE platform and ChartViz, indicating strategic investments in technology. It emphasizes user-centric design principles and the ability to create highly interactive dashboards to enhance user engagement.

Innova Solutions

Innova Solutions emphasizes developing customizable dashboards that utilize in-house frameworks built with modern web technologies, responsive design principles and mobile-first design, enhancing user accessibility and engagement.

Mphasis' comprehensive suite of next-generation data and cognitive analytics offerings showcases a distinct capability to adapt and modernize complex data environments. Its dashboard development and customization are enhanced by its focus on user-centric tool creation.

Persistent Systems uses tools such as the Reports Migration Accelerator to address typical challenges, such as data duplication and manual interventions, in BI reporting. Its automated report-creation processes ensure faster delivery and enhanced collaboration.

Stefanini's insights and business strategy services highlight its commitment to delivering actionable insights and empowering users through effective communication and knowledge management with tools such as SAI.Insights.

Unisys provides comprehensive data and analytics solutions that help organizations optimize operations, enhance CX and drive innovation. Its offerings include data analytics, data transformation and data governance and management.

UST emphasizes collaboration and data democratization through its UST Insights Studio, a widget-based executive reporting and dashboarding tool that offers an intuitive user interface, enabling various stakeholders within an organization to access data insights easily.

Virtusa's data and analytics solutions integrate various BI and reporting tools, building custom and versatile reporting capabilities. Its Global Report Factory model and dedicated CoE enhance flexibility and ensure robust support.

ITC Infotech's (Rising Star) services emphasize transforming raw data into insights tailored to meet industry needs. The integration of BI tools such as Tableau and Power BI supports dynamic data storytelling and visualization, aiming to engage and inform users across business units.

Leader

"Unisys extracts deep insights from enterprise data, empowering organizations to transform their data into strategic assets through advanced analytics solutions that prioritize security, driving meaningful business outcomes and transformative results."

Gowtham Kumar Sampath

Unisys

Overview

Unisys is headquartered in Pennsylvania, U.S. It has more than 16,500 employees across 48 offices in 22 countries. In FY23 the company generated $2.0 billion in revenue, with Enterprise Computing Solutions as its largest segment. Unisys integrates advanced visualization and dashboard tools into its data analytics solutions, simplifying IT reporting and deployment. These tools provide real-time insights and security metrics, enhancing decision-making and reducing IT complexity. It provides robust data analytics tools that enable organizations to consolidate and visualize data, delivering insights that drive decisions across various business units.

Strengths

Comprehensive analytical solutions: Unisys integrates advanced technologies such as ML and AI, creating a sophisticated analytical framework that allows organizations to derive deep insights from their data. The analytics capabilities enable organizations to move from intuition-based decisions to data-driven insights.

Transformative business outcomes: Unisys positions its analytics solutions as essential to achieving transformative results. By aligning data strategies directly with business objectives, it emphasizes the strategic importance of effective data management, enabling clients to leverage data for maximum business value.

Enhanced BI reporting and collaboration: The emphasis on data visualization tools ensures insights are accessible and understandable, promoting a culture of data-driven decision-making. This focus on democratization allows stakeholders at all levels to engage with data, enhancing collaboration across departments.

Customizable dashboard development: Unisys provides robust data visualization tools with customizable dashboards that streamline insight generation and user engagement. This flexibility is crucial for businesses looking to adapt analytics to fit their specific operational needs, distinguishing Unisys from competitors that may offer standardized solutions.

Caution

To maintain a competitive edge, Unisys should invest and promote its advanced data visualization technologies that enable deep interaction and customization. Embracing emerging tools and techniques will be essential in meeting clients' diverse needs.

Star of Excellence

A program, designed by ISG, to collect client feedback about providers' success in demonstrating the highest standards of client service excellence and customer centricity.

Source: ISG Star of Excellence™ research program, Insights till December 2024

In the ISG Star of Excellence™ research on enterprise customer experience (CX), clients have given feedback about their experience with service providers for their Advanced Analytics and AI services.

Based on the direct feedback of enterprise clients, below are the key highlights:

Client Business Role

▲ **Most satisfied**
Asia

▼ **Least satisfied**
North America

Region

▲ **Most satisfied**
Healthcare

▼ **Least satisfied**
Telecom and Media

Industry

▲ **Most satisfied**
Information Technology

▼ **Least satisfied**
Human Resources

Industry Average CX Score

▲ **Highest CX: 88.2**
▼ **Lowest CX: 55.6**

CX Score: 100 most satisfied, 0 least satisfied
Total responses (N) = 782

Most Important CX Pillar

[Business Continuity and Flexibility]

Service Delivery Models	Avg % of Work Done
Onsite	52.1%
Nearshore	22.3%
Offshore	25.6%

Appendix

Methodology & Team

The ISG Provider Lens 2024 – Advanced Analytics and AI Services research study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

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

The study was divided into the following steps:

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

Lead Analyst

Gowtham Kumar Sampath
Assistant Director and Principal Analyst

Gowtham Sampath is an Assistant Director and Principal Analyst with ISG Research responsible for authoring ISG Provider Lens™ quadrant reports for Banking Technology/Platforms, Digital Banking Services, Cybersecurity and Analytics Solutions & Services market. With 15 years of market research experience, Gowtham works on analyzing and bridging the gap between data analytics providers and businesses, addressing market opportunities and best practices. In his role, he works with advisors in addressing enterprise clients' requests for ad-hoc research requirements within the IT services sector, across industries.

Furthermore, he authors thought leadership research, whitepapers, articles on emerging technologies within the banking sector in the areas of automation, DX and UX experience as well as the impact of data analytics across different industry verticals.

Research Analyst

Saravanan M S
Research Specialist

Saravanan M S is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Analytics Services and Platforms. In this role, he aids the lead analysts in the research process and is the author of the global summary report. He also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments.

Saravanan has six years of experience and expertise in technology, business and market research and has been associated with technology research firms specializing in sales and talent strategies across industries. He has also spearheaded end-to-end research and consulting projects for global system integrators and enterprise clients.

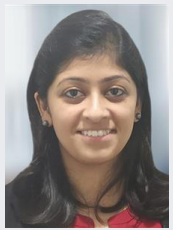
Research Analyst

Vartika Rai

Senior Research Analyst

Vartika Rai is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Analytics Services, and SAP Ecosystem. She supports the lead analysts in the research process and authors the global summary report. Vartika also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Vartika started her current role in June 2022. Before this role, she worked on secondary research, competitive intelligence, market trends, and newsletter analysis.

Study Sponsor



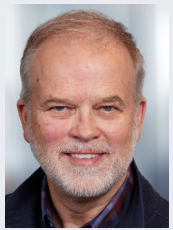
Namratha Dharshan

Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens™ program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens™ program.

She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance. She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

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

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

ISG Provider Lens™

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

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

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 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 isg-one.com.

ISG Provider Lens™

DECEMBER, 2024

REPORT: ADVANCED ANALYTICS AND AI SERVICES