

Analytics Services

Data Management Services - Midsize

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



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CDOs will invest in analytics-led transformation programs to enable data and AI-driven decision intelligence.

The analytics services market in Europe saw significant traction and demand, which empowered providers to innovate and revolutionize to address enterprise challenges in sub-optimal utilization of the data and analytics investments. ISG's analysis indicates that enterprises in Europe continue to face challenges like their counterparts in other regions. However, the market shows a clear distinction in approach and investments, given the varied levels of analytics maturity among large and midsize enterprises.

Enterprises in Europe face multidimensional challenges spanning geopolitical tensions, economic uncertainties, rising operating costs, supply chain disruptions, and environmental regulations and sustainability practices. The economic outlook uncertainties, including volatile currency value and market dynamics,

disrupt operations and planning, thereby creating a challenging environment for enterprises in Europe. Enterprises also need to navigate the escalating operational costs resulting from macroeconomic factors such as fluctuating energy prices and shifts in labor costs. The increased awareness of environmental compliance has triggered a drastic shift toward sustainable practices. Enterprises in Europe are confronted with the peculiar challenge of aligning their operational strategies and methods to comply with stringent environmental norms and regulations. Recognizing the need, enterprises need to mandate a fundamental reevaluation of production processes, supply chain management and product offerings to ensure adherence to green standards.

Therefore, the approach to identifying challenges and the ensuing activities to ensure effective operational performance, reduced costs, increased governance and enhanced CX largely aligned with the enterprise's analytics maturity. The market highlights the need to accommodate and align with the global trends in fostering data-centricity and a data-driven culture.

Analytics initiatives are foundations for **comprehensive business and digital transformation.**



ISG has identified the following challenges enterprises face:

Analytics spending and rationalizing investments:

European enterprises see heightened consciousness of technology spending amid rising fear of a potential recession and prevailing economic headwinds. These uncertainties directly impact the budget for analytics spending and restrain CDOs' ability to invest in analytics tools. Enterprises in Europe are strategically focused on maximizing the utilization of their existing data and analytics investments and tools, reflecting a prudent and cost-effective strategy and deliberate effort to rationalize and optimize data and technology assets. This emphasis on seeking to extract optimal value from their current data and technology assets in the face of economic challenges signifies the importance of rationalizing data assets.

Adoption of enterprise-wide analytics:

Many European firms are confronted with the imperative of undergoing analytics adoption and transformation, which involves adopting cutting-edge technologies, churning out legacy systems, and instilling a digital

mindset and culture within the enterprise. The adoption of analytics tools and systems demands a substantial upgrade of their existing infrastructure, involving careful engineering and integration of data assets. This process requires meticulous planning, technical expertise and execution to ensure that the upgraded infrastructure effectively supports the analytics tools' functionalities and provides the necessary foundation for data-driven decision-making. Cultivating a digital mindset necessitates a cultural shift, requiring employees to adapt to and embrace a more data-driven approach to business processes. Overcoming these challenges is crucial for enterprises aiming to harness the full potential of analytics and position them competitively in the evolving market.

Efficient systems and models for use

cases: Enterprises in Europe are hindered with numerous challenges across business functions, including, but not limited to, expense efficiency, productivity, market expansion, product diversification, adaptability, innovation and operational agility. Enterprises must address these challenges, and this

requires robust strategic planning, leveraging technology, and fostering a culture of innovation and adaptability. European firms need to find a balance between compliance, cost-efficiency and innovation to thrive in a competitive and dynamic business landscape. Firms need to invest in technology-driven applications that facilitate swift transformation and automate every component of the business value chain.

High technology infrastructure costs:

Technology infrastructure costs are drifting higher as enterprise data volumes are expanding. Managing these expenses through strategic decision-making can lead to efficient and cost-effective solutions that support business objectives. European firms need to forecast future infrastructure needs and associated costs based on historical data and trends that could assist in better budgeting and planning. This could aid business users with comprehensive data analysis, enabling them to make informed decisions about technology spending and strategies while considering cost implications.

Dynamic changes in data compliance and regulations:

Data regulations and compliance are often complex, requiring a deep understanding. Applying them is more challenging for enterprises that handle diverse data sets and operations. The landscape of compliance and data regulations is dynamic, as regulatory bodies are introducing new requirements, posing significant challenges for enterprises. As data assets are siloed across the enterprise, it is difficult to meet compliance standards for data integration and management across sources. Data complexity and massive data volumes make adherence more challenging. Addressing the changes requires a proactive approach as enterprises need to update, adapt and align with these regulatory and compliance changes.

New revenue streams: Many enterprises in Europe struggle to identify markets and niche segments that are untapped at present. The challenge is largely in identifying and capitalizing on opportunities that can significantly impact their revenue streams. Investment in analytics yielded robust insights on identifying the uncatered markets and



segments and also led to the development of new products and solutions, creating new revenue streams. Enterprises can also monetize their data and create additional revenue streams by selling data-related products and services through packaged data as reports or insights; providing subscription-based access to data platforms; licensing secure data access; partnering for joint services; and providing targeted customer insights.

Skill and talent gap: The continuous advancements in digital technologies such as generative AI (GenAI), ML and big data analytics necessitate specialized expertise. While European enterprises rapidly embrace these technologies, there is a substantial shortage of skilled professionals with these niche skill sets. The exponential surge in data volumes further demands proficient advanced technology and digital professionals capable of effectively managing, analyzing and extracting valuable insights from extensive and complex data assets. This shortage of skilled talent poses a significant obstacle for businesses aiming to fully harness the potential of these cutting-edge technologies, impeding their

ability to capitalize on the wealth of data and information available and, in turn, hindering innovation and competitive edge.

CDOs are actively seeking the following solutions to enhance their current circumstances in handling data, particularly to incorporate business transformation through AI/ML-led enhancements. They are keen on solutions that empower them to derive meaningful insights, foster innovation and drive strategic decision-making through their data initiatives.

Aligning with business objectives and KPIs: CDOs are looking for solutions that help them better prioritize their data-centric initiatives and align them with enterprise business objectives. Service providers can equip enterprises to establish a solid foundation to build their AI strategy utilizing their IP assets such as accelerators, frameworks and platforms that are powered by digital technologies like AI/ML, deep learning, NLP and computer vision. Establishing key performance indicators (KPIs) is critical to validate the alignment with business goals. KPIs can include metrics related to revenue growth, customer retention,

operational efficiency, cost savings and improved decision-making to track the impact of AI initiatives in real time and make data-driven adjustments to ensure continuous improvement.

Unlock analytics investments: Enterprises aim to foster an innovation mindset and culture that significantly pushes them to invest in digital capabilities, analytics and AI. They want to unlock value quickly, responsibly and sustainably from analytics to embrace an AI-led operating model. Service providers can help enterprise shift their approach to deliver impactful data-driven decisions at a considerably reduced cycle time. Enterprises aim to realize and unlock value from existing data and analytics investments in identifying new business opportunities and optimizing processes utilizing advanced analytics technologies.

AI and automation-driven intelligence: European enterprises aim to adapt to an AI-driven approach for operational decision-making, fully utilizing the value of data, including AI, in their workflows and processes. The evolution to an AI-driven approach

amplifies the swift processing of structured data, augmenting human intelligence, decision-making and problem-solving capabilities utilizing AI algorithms, ML models, NLP and other advanced analytics to process vast amounts of data, recognize patterns and generate insights. Service providers are highly equipped to drive the entire transformation that could further lead to automated decision intelligence.

Decision-making with real-time insights generation: Real-time insights provide enterprises with instant updates on information that enables proactive decision-making and rapid response to market dynamics. Service providers have invested and developed capabilities to overcome the limitations of batch processing and delayed reporting, which causes lags in decision-making that cost time and resources. Enterprises need to be equipped with complex event processing, large-language models (LLM), GenAI, ML, NLP and other advanced analytics capabilities to derive actionable real-time insights from streaming data for agile decision-making with higher accuracy.



Robust data architectures and governance:

Enterprises need to democratize data management, envisioning data not in silos but freely accessed between different systems, applications and users. Data mesh architecture shifts toward automated analytics at scale, delegating dataset ownership from centralized to individual teams or business users, enabling agility and scalability within a decentralized governance framework to power real-time decision-making in businesses.

Notes on quadrant positioning: In this study, several data analytics service providers that offer similar portfolio attractiveness in most quadrants have been assessed. This reflects the relative maturity of the market, providers and offerings. It is a given that not all are equal in circumstances. The vertical axis positioning in each quadrant reflects ISG's analysis of how well the offerings align with the full scope of enterprise needs. The market has also been segmented into large, mid-market and specialists to showcase the varying analytics requirements of enterprises based on their size, scale and industry dynamics.

It also reflects providers' strategy to align their portfolio and offerings to suit market demand and enterprise needs.

Depending on analytics maturity, the investment in analytics is primarily targeted at data-driven decision-making for mid-level enterprises and business transformation or reinvention for large enterprises that are becoming data-centric. While data-driven organizations rely completely on data for business and operational decisions, data-centric organizations approach data as a core and independent asset, viewing it as a product.



 Provider Positioning

	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
Accenture	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
adesso SE	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Contender
Alexander Thamm	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In
Atos	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
b.telligent	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In
Birlasoft	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
BJSS	Not In	Product Challenger	Not In	Not In	Contender	Not In	Not In	Contender
Brillio	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
Capgemini	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In



 Provider Positioning

	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
CGI	Leader	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Cognizant	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
Deloitte	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
doubleSlash	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Not In
DXC Technology	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
EPAM Systems	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
EXL	Contender	Not In	Not In	Contender	Not In	Not In	Contender	Not In
EY	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Fractal	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In



 Provider Positioning

	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
Genpact	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
GFT	Not In	Market Challenger	Not In	Not In	Not In	Not In	Not In	Not In
HARMAN DTS	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
HCLTech	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
Hexaware	Not In	Not In	Not In	Not In	Leader	Not In	Not In	Leader
Hitachi Digital Services	Contender	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
IBM	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Infosys	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
ITC Infotech	Not In	Rising Star ★	Not In	Not In	Rising Star ★	Not In	Not In	Contender



 Provider Positioning

	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
it-novum	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Contender
Keyrus	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger
KPMG	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Kyndryl	Product Challenger	Not In	Not In	Contender	Not In	Not In	Contender	Not In
LTIMindtree	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In
Marmeladenbaum GmbH	Not In	Not In	Product Challenger	Not In	Not In	Contender	Not In	Not In
MathCo	Not In	Not In	Rising Star ★	Not In	Not In	Rising Star ★	Not In	Not In
Mphasis	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
Mu Sigma	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In



 Provider Positioning

	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
N-iX	Not In	Not In	Contender	Not In	Not In	Contender	Not In	Not In
NTT DATA	Rising Star ★	Not In	Not In	Rising Star ★	Not In	Not In	Rising Star ★	Not In
OPITZ CONSULTING	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Not In
Orange Business	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
Persistent Systems	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
pmOne	Not In	Not In	Contender	Not In	Not In	Contender	Not In	Not In
PwC	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In
Quantiphi	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In
Reply	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In



 Provider Positioning

	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
Sigmoid	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
SLK Group	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
Sopra Steria	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Not In	Not In
STATWORX	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In
Stefanini	Not In	Contender	Not In	Not In	Contender	Not In	Not In	Contender
TCS	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
Tech Mahindra	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
Tiger Analytics	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In
Tredence	Not In	Not In	Leader	Not In	Not In	Leader	Not In	Not In



 Provider Positioning

	Data Science Services - Large	Data Science Services - Midsize	Data Science Services - Specialist	Data Engineering Services - Large	Data Engineering Services - Midsize	Data Engineering Services - Specialist	Data Management Services - Large	Data Management Services - Midsize
UST	Contender	Product Challenger	Not In	Contender	Product Challenger	Not In	Contender	Contender
Virtusa	Not In	Leader	Not In	Not In	Leader	Not In	Not In	Leader
Wavestone	Not In	Contender	Not In	Not In	Not In	Not In	Not In	Contender
Wipro	Leader	Not In	Not In	Leader	Not In	Not In	Leader	Not In
WNS	Not In	Market Challenger	Not In	Not In	Market Challenger	Not In	Not In	Market Challenger
Zensar Technologies	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger
ZS	Not In	Not In	Product Challenger	Not In	Not In	Product Challenger	Not In	Not In



The report provides insights into the **evolving market trends** and **competitive dynamics** among providers of Analytics Services in 2023.

Simplified Illustration Source: 2023



Definition

The year 2023 continues to witness economic headwinds with increased inflation, while the global economy exhibits signs of resilience, with enterprises becoming cautious about IT transformation expenditure. This scenario is further complicated by increased hypercompetition among enterprises and tech-savvy startups and consumers' hyperpersonalization needs. With enterprise budgets strapped, business leaders show more value for their existing investments in digital technologies and focus on enhancing CX, cost optimization and cybersecurity to ensure business and operational resilience. ISG analysis reveals that this is an opportune time for enterprises to revisit their analytics strategies and increase spending on analytics services and solutions to enhance data-driven approaches and solve business challenges. Data science services are gaining significant traction, aligning business objectives with underlying data and helping enterprises derive decision intelligence and evaluate business impact. Enterprises expect providers to identify relevant business use cases, offer AI



and ML modeling platforms and engineering capabilities, and deploy these models to production. Data engineering services are in demand owing to several cloud migrations and data modernization investments. The focus will be on achieving high cost and process efficiency optimization levels with traction for FinOps, DataOps and DevSecOps. Data management services are making a significant comeback, with data governance capabilities in demand. Enterprises compete for providers with capabilities in data catalog, data observability, data lineage and business glossary, among other areas that ensure data trustworthiness and availability.

Scope of the Report

This ISG Provider Lens™ quadrant report covers the following eight (spell out the number of quadrants, do not use a digit) quadrants for services/solutions: Data Science Services – Large, Data Science Services – Midsize, Data Science Services – Specialists, Data Engineering Services – Large, Data Engineering Services – Midsize, Data Engineering Services – Specialists, Data Management Services – Large, and Data Management Services – Midsize.

This ISG Provider Lens™ study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers/software vendors
- A differentiated positioning of providers by segments (quadrants)
- Focus on the regional market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise

clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

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.

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.

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.

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 Management Services - Midsize

Who Should Read This Section

In this quadrant, ISG assesses the positioning of data management service providers and evaluates the changing market dynamics in Europe. Service providers offer end-to-end storage, management and governance of data to mid-market clients to adhere to relevant compliance guidelines and standards.

Enterprises focus on strategically managing and governing their data environment to ensure data trustworthiness, security, privacy and compliance. They need a single, 360-degree view of data to drive value in current workflows, enabling them to derive timely business insights. Considering this, service providers develop a data management roadmap for data-led monetization, compliance, privacy regulation and governance. The roadmap unifies information across enterprise-wide data sources, ensures data accuracy and consistency, and delivers a complete view of trusted, high-quality data.

Enterprises invest in automated data monitoring and infrastructure management with an emphasis on protecting data and ensuring adherence and compliance with data regulations and standards. Service providers leverage AI/ML and develop accelerators, frameworks and solutions to manage compliance processes, including automated data monitoring and analysis, risk assessment, fraud detection and prevention, and behavioral analysis.



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



Chief Data Officers can refer to this report to gain perspective on effective analytics tools and techniques to deliver business outcomes from data assets and ecosystems.



Data Management Professionals should read this report to understand the relative positioning and capabilities of providers that can help implement and maintain compliance and governance standards.



Chief Digital Officers, responsible for strategizing a digital approach, should read this report to better understand the effective analytics tools and techniques that enable frictionless transactions virtually.





This quadrant assesses providers that offer **master data management, metadata management, data migration and data lineage** services, in addition to providing **data quality, data security and control**, compliance, and creation and management of data lakes.

Gowtham Kumar Sampath



Data Management Services - Midsize

Definition

In this quadrant, ISG assesses service providers in the data management services category that are capable of managing end-to-end storage, sharing, archiving and data retrieval by adhering to relevant compliance guidelines. Providers should offer consulting capabilities that include, but are not restricted to, assessment, strategy development and roadmap creation. These capabilities should also include assistance for planning, designing and deploying data management services. Providers should help enterprises in organizing and cataloging data from different sources. Offerings from service providers include, but are not limited to, workflow management, data modeling, data integration, master data management, metadata management, data migration and data lineage services as part of the data management services. Providers should also possess the self-service capability to make data available for stakeholders to be consumed in a simple format. Providers should set data governance strategy to ensure regulatory compliance standards are met. They should also be able to develop and implement

data governance systems and policies and procedures for effective and efficient data management. The quadrant encompasses services for ensuring data quality, data security and control, complying with GDPR, and creating and managing data lakes, among others.

Eligibility Criteria

1. Offer **consulting expertise for assessment, strategy and roadmap**, along with **lifecycle and workflow management**
2. Possess the capability to **manage and govern data by establishing trust and adhering to relevant compliance guidelines**
3. Encompass the ability to **develop data architecture and offer data modeling**
4. Offer data integration, **data migration, master data management and metadata management** capabilities as part of data management services
5. Provide **data cataloging** from disparate sources, **data stewardship and business glossaries**, along with **maintaining and controlling data quality** and providing **data security**
6. Track **data lineage** back to the data origin
7. Offer **regulatory compliances** such as GDPR
8. Possess experience in **establishing CoEs** as part of the services offering



Data Management Services - Midsize

Observations

Enterprises prioritize safeguarding data and adhering to global and local regulations by maintaining a robust data security system and implementing comprehensive data governance frameworks. This also involves a strategic focus on ensuring that data is secure, compliant and managed with precision, reflecting the proactive approach to create a robust foundation for trust and reliability. Service providers invest and build a comprehensive data management portfolio to assist chief data offices in ensuring a high standard of data quality and governance at scale. They also ensure and establish a uniform and consistent approach to handling data throughout the enterprise, aligning with their data strategy.

Service providers are integral enablers in establishing a comprehensive data governance program for enterprises, specifically targeting data stewardship and client data protection. They assist enterprises in crafting a tailored governance strategy and designing and implementing a robust data governance framework encompassing roles, responsibilities and processes.

Service providers invest heavily in AI/ML and other advanced analytics technologies to automate and streamline multiple aspects of compliance management for improved efficiency and accuracy in regulatory adherence. A GenAI-based solution is employed for analyzing textual data and extracting compliance-related insights from contracts and legal documents, extending the use of AI to detection and identification of suspicious patterns to prevent non-compliance.

From the 105 companies assessed for this study, 19 qualified for this quadrant, with six being Leaders.



Harman DTS' proactive approach to compliance management leverages AI/ML and advanced tools to enable critical compliance monitoring. This allows enterprises to assess and predict risks, providing a comprehensive solution to enhance compliance and mitigate risks.



Hexaware strongly emphasizes responsible and ethical AI usage, prioritizing data privacy and security and providing guidance on ethical data handling. Its compliance frameworks and data quality metrics empower clients to make informed data-driven decisions.



Mphasis capitalizes on its diverse experience to implement data governance with an embedding approach at the design phase. It preempts data challenges across metadata management, quality and MDM, ensuring a holistic data governance strategy.



Orange Business aligns delivery with data strategy, ensuring consistent data handling across the enterprise, prioritizing compliance, protecting data against unauthorized access, and effectively managing metadata catering to different levels of data maturity.



Data Management Services - Midsize



Persistent Systems assists enterprises in evaluating data management maturity and develops roadmaps for data-driven success, compliance and governance. Its data governance and management solutions offer a comprehensive view of enterprise data, facilitating timely insights and regulatory compliance.

virtusa

Virtusa has a robust data governance framework that ensures data quality and integrity while unlocking valuable insights. This approach enables it to deliver exceptional CX, ensuring that data is compliant and also adds value.





“Orange Business’ complete data management offerings empower chief data offices and maximize data quality and governance at the enterprise scale.”

Gowtham Kumar Sampath

Orange Business

Overview

Orange Business is headquartered in Paris, France and operates in 65 countries. It has more than 29,000 employees across over 100 global offices. In FY22 the company generated €7.9 billion in revenue, with IT Services as its largest segment. The company focuses on IT redesigning with data governance at the core of the transformation efforts across all digital and big data projects. The company helps protect against inappropriate access to data and its use, map all corporate data and ensure clear management of metadata, as well as manage and optimize reference data to enable consistent use.

Strengths

Data monetization strategy: Orange Business leverages consumer data, enables enterprises to build data-sharing platforms, provisions them to sell insights to suppliers and third parties, and executes their marketing campaign on data. It designs data architecture and infrastructure to provide real-time operational information and insights through reporting and APIs.

End-to-end service offerings: Orange Business’ data offerings target enterprises across various levels of data maturity and widespread across data management< including data strategy, governance, quality, literacy, maturity, consistency, cataloging, CDO and MDM implementation.

Data governance strategy: Orange Business ensures delivery alignment to data strategy by people, processes and tools required to create a consistent handling of data across the organization. Orange Business helps enterprises ensure compliance, guarantee respect for regulatory constraints, protect against inappropriate access to data and its use, and map all corporate data ensuring clear management of meta-data. Robust data governance guarantees the quality of data in IT and applications and manages and optimizes reference data to allow for consistent use.

Caution

Orange Business should highlight its capabilities in data fabric, data mesh and IP assets, including tools, frameworks and accelerators that are needed for faster service delivery with thought leadership and customer success stories.





Appendix

The ISG Provider Lens™ 2023 – Analytics Services research study analyzes the relevant software vendors/service providers in the Europe 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 report includes research from the ISG Provider Lens program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of November 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

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

The study was divided into the following steps:

1. Definition of Analytics 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



Author & Editor Biographies

Lead Analyst



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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.

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Author & Editor Biographies



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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.



IPL Product Owner

Jan Erik Aase
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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.



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