Gartner

# Market Guide for Data and Analytics Service Providers

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External support can accelerate the success of data and analytics programs, and new delivery models and modern technologies are disrupting the services market. Data and analytics leaders should evaluate and select providers both for their current expertise and emerging capabilities.

## Key Findings

- Most data and analytics external service providers (ESPs) have well-established capabilities and similar services and solutions. Differentiating between these providers is becoming more challenging, making the selection process more complicated.
- Not all ESPs have strong capabilities across all areas (geography, industry, domain or technologies supported). Global ESPs have the ability to scale their services, but specialist "boutique" ESPs are popular when clients have specific requirements.
- ESPs with repeatable, robust and proven data and analytics platforms, solutions, accelerators and frameworks can help accelerate implementations with a more predictable and measurable "asset based" consulting approach. But these assets are not always architected to integrate, scale or operate with the larger enterprise tech stack.
- Demand for data and analytics solutions to incorporate artificial intelligence (AI) and machine learning (ML) will continue to grow. However, the largest need is still for data and analytics core capabilities, while strategic services and industry expertise remain top evaluation criteria.

## Recommendations

For data and analytics leaders who require third-party help to execute their data and analytics strategies:

- Work closely with business leaders to identify applicable use cases that require data and analytics support. Consider working with multiple service providers, each of which provides specific capabilities, rather than a single provider for all data and analytics initiatives.

- Map and evaluate your data and analytics needs against ESPs for their geographic coverage, domain expertise, industry experience and technology skills to identify a potential fit.
- Favor ESPs that develop prepackaged solutions, repeatable methods and reusable data and analytic frameworks that augment their consultant's efforts. But map those against the strategic roadmap and architecture standards for your organization prior to engagement.
- Seek support from ESPs that exhibit specific strengths in strategy, implementation, data management, analytics and AL/ML capabilities, depending on your project requirements.

## Strategic Planning Assumptions

By 2022, over half of data and analytics services will be done by machines instead of human beings, up from 10% today.

By 2022, evaluators of data and analytics services will disqualify over 50% of providers due to lack of business knowledge and coverage of essential data strategy and data management skills.

By 2025, one in five organizations will consume data and analytics software and services from a single provider.

## Market Definition

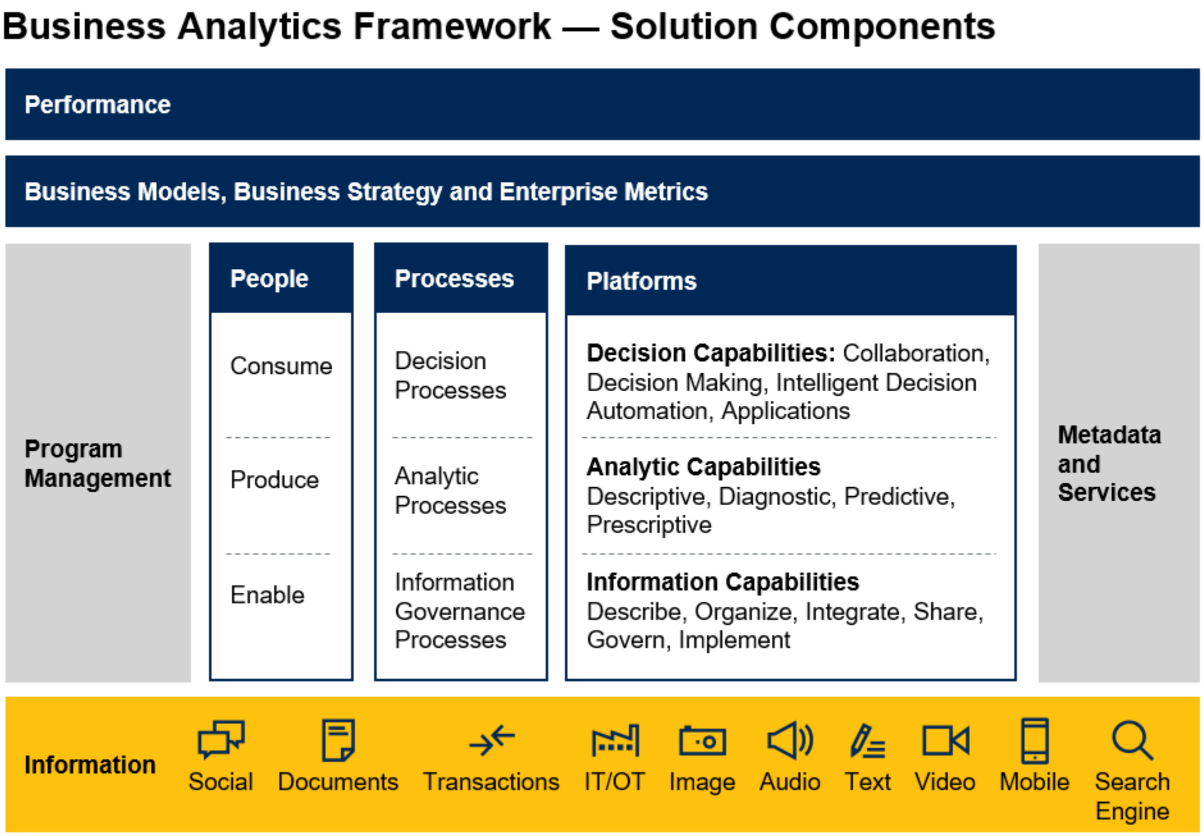
Gartner defines the data and analytics services market as composed of consulting, implementation and managed services for decision, analytics and data management capabilities. These are executed on technology platforms that support an organization's fact-based decision making for digital transformation. Services may include commercial off-the-shelf (COTS) solutions and proprietary assets, focusing on business use cases and outcomes, as well as information infrastructure and governance.

Data and analytics service providers also offer asset-based consulting via domain-specific solutions or integrated platforms composed of their own packaged applications, repeatable methods and reusable analytic frameworks. These solutions can be delivered as both on-premises and cloud-based managed services.

### Market Description

Data and analytics services provide effective alignment and integration based on Gartner's Business Analytics Framework (see Figure 1).

Figure 1. Business Analytics Framework — Solution Components




Source: Gartner
ID: 367665

This Market Guide predominantly lists providers that tend to service small to midsize customers or deal in local countries or markets. The largest global service providers are covered in "Magic Quadrant for Data and Analytics Service Providers, Worldwide," and they primarily target the larger and more complex enterprises. However, Market Guide vendors increasingly collaborate with larger organizations, especially for more focused or domain-specific data and analytics services.

The following are typical data and analytics services offered to clients:

- **Strategy consulting,** including business process reengineering or redesign, business process transformation, and business performance and improvements based on insights from data and analytics.
- **Analytics consulting,** including logical data model design, data and analytics program strategy and definition, tool and application evaluation and selection, key performance indicator (KPI) libraries for decision management, predefined integration touchpoints, AI, data science, and machine learning.

- **Data management consulting,** including best practices, strategy and implementation across data management architecture comprising data integration, data quality, metadata management, data governance, data privacy including compliance (like GDPR compliance), master data management (MDM), and logical data warehousing.
- **Managed services** for commercial and proprietary platforms, including public, multi- and hybrid-cloud strategy.
- **Organizational change management services,** including redesigning roles and responsibilities, communications and training.
- **IT consulting,** including alignment of business architecture with technology architecture, solution planning and piloting, data warehouse, and big data project design.
- **Implementation services,** including project management, application configuration, development of interfaces, customization, deployment, instance consolidation, data migration, data loading and integration.
- **Testing services,** including integration testing and user acceptance testing.
- **Operations management services,** including scope and governance for the application portfolio, alignment of applications by process area, methods for continuous improvement of the processes, approach to management, portfolio updates, and portfolio outsourcing.

## Market Direction

Some of the most visible trends and driving forces that contribute to the market disruption include the following:

- **New business models.** The market is moving from implementing standard software through delivery and development of labor-based services toward buying customizable software and automated services. This can potentially mean dealing with a single vendor that is a service provider, software developer, technology innovator and ecosystem enabler all in one.
- **New pricing models.** The typical pricing models are moving from time-and-material-based or fixed prices toward different models, such as pay-per-use, outcome- or value-based models, subscription, or even shared risk-reward. Some clients are even shifting toward monetizing their data and analytics together with their service provider (see “Start Monetizing Data and Analytics With Your Service Provider Now”).
- **Servware.** In order to address specific business processes or market verticals, service providers are adding software to their services. The results are software-defined services, or “servware,” often taking the form of a platform and/or solution (see “Take Advantage of the Disruptive Convergence of Analytic Services and Software”).
- **New collaboration models.** Increasing complexity and possibilities lead to new forms of collaboration between service providers and their clients or partners, or even a combination of them all: services to services, services to software, services to ecosystem, services to customers.

- **New data and analytics providers.** The existing players — mainly large system integrators (SIs) and consultancies or boutiques — find themselves in competition with business software vendors such as Salesforce (Einstein), business process outsourcing (BPO) service providers, analytics software vendors that offer services, and competition or crowdsourcing platforms. We expect to see an increasing amount of mergers and acquisitions in this space. There are also many midsize to small data and analytics service providers entering the market and the momentum will continue.
- **Increased managed services.** Organizations are shifting away from implementing and managing their own traditional IT-centric platforms to using managed services with proprietary cloud-based platforms and off-the-shelf solutions. Unlike traditional managed services, many data and analytics providers are also managing insights and/or business outcomes for their clients, in addition to the infrastructure and applications.
- **Data privacy.** The ability of some organizations to engage external partners effectively is impeded as they wrestle with internal policies around data privacy and do not fully understand the implications and considerations around privacy and data and analytics.
- **Asset-based services.** Data and analytics providers are developing "assets" such as frameworks, templates, accelerators, methodologies and best practices, packaged analytics applications and algorithms, improving solution quality, repeatability, project delivery effectiveness, and time to value.
- **AI-related consulting and SI services.** These are strategy, design and implementation services offered by service providers to leverage AI. Services include design-thinking sessions, ideating use cases, reconfiguring or redesigning business or IT processes, evaluating and prototyping technologies, architecting the connection between technologies, and legacy applications. These services also include curating data, building and training algorithms and models, developing, testing and integrating solutions, assessing and mitigating risks, and defining a new talent mix of skills (see "Market Guide for AI-Related Consulting and SI Services for Intelligent Automation").

## Market Analysis

The overall market outlook for data and analytics services will continue to be strong. New spending on disruptive technologies (for example, AI and ML) to be embedded into data and analytics will further support strong growth for overall data and analytics services. However, the speed of revenue growth has been slightly slowing as the market becomes more mature. It is estimated that the market, currently at $179 billion with a 17.3% growth rate in 2019, will be at $267 billion but with 12.9% growth in 2022 (see "Market Insight: 3 Business Imperatives to Stay Relevant in the Data and Analytics Service Market").

The market for providers that focus on tactical, technology-oriented projects will primarily offer implementation of data management technologies and infrastructure, analytics and BI software, descriptive/diagnostic analytics initiatives, and the creation of data models and architectures. This segment will continue to have the largest market size, but the fastest decline in growth rate (10.8%

in 2019 to 7.6% in 2022). This is because the market will shift more toward managed service/as-a-service offerings, and these services will become more commoditized and replaced by automation.

Some providers are starting to offer more thought-leading, innovative ideas and engagement models (like crowdsourcing or marketplaces), industry and process expertise, and integrated platform solutions. These providers will be in a better position to enable enterprises in their digital transformation journey.

While there are various data and analytics adoption speeds across all regions, overall data and analytics services continue to mature worldwide. The urgency for organizations to transform into digital businesses and to compete more effectively in the global market is forcing buyers to become more data-driven. However, there are still many challenges: lack of skills; lack of a solid data and analytics infrastructure; and lack of overall willingness to implement a companywide data and analytics strategy and operating model. Although many enterprises are still using data and analytics at a tactical rather than strategic level, market dynamics and new offerings from providers are allowing buyers to explore new engagement models for their data and analytics initiatives.

According to Gartner's fourth annual chief data officer (CDO) survey, "lack of resources" is the most frequently mentioned roadblock to success after "culture" (39% and 35%, respectively; both ranked in the top three).[1]

Companies should look to hire external resources and train the necessary internal ones to effectively deploy and support their data and analytics programs and lead their vendor management efforts. Clients should select data and analytics providers that work with their internal team and use best practices, frameworks and methodologies. Clients should favor service providers that embed knowledge transfer and documentation into their delivery.

Historically, data and analytics providers have helped companies to improve or supplement in-house expertise and provide knowledge transfer. However, in recent years, providers have advanced in their focus, offerings, skills and operation models. Many of them are in the process of pivoting into using a more business-oriented approach to resonate better with line-of-business buyers.

Another reason that companies are engaging with data and analytics providers is that they can bring in experiences, best practices and lessons learned from having implemented similar solutions for other clients in a specific industry or domain. Finally, there is a strong trend toward managed services.

There are five dominant reasons why clients outsource some data and analytics:

1. When the **demand is infrequent** (for example, for sales forecasting carried out on a quarterly basis).
2. When a **rapid response is required** or when the turnaround time for a business request is short.
3. When the **requirements are beyond the internal capabilities** of infrastructure, skill sets or technology.

4. When **low or known cost is favored,** particularly for a stable solution requiring predictable service levels.
5. When **data and analytics are a commodity** (for example, traditional BI/data warehouse projects), so that the organization can focus on higher value data and analytics projects to innovate the business.

There are also two emerging reasons:

1. When organizations **lack the capabilities to deal with required innovation,** prototyping and experimentation, and value discovery.
2. When C-level executives or lines of business are **looking for domain-specific solutions.**

Concerns such as costs, data privacy and security, talent management and loss of competitive advantage are all valid. However, these obstacles are unlikely to be difficult to overcome for particular companies outsourcing certain types of analysis.

For the majority of the market, the potential opportunities will outweigh the perceived risks.

## Representative Vendors

*The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.*

### Market Introduction

This section provides a representative list of some of the most visible data and analytics ESPs as determined by Gartner. Selection was based on the players' market visibility, as well as mind share among Gartner clients and analysts, including client inquiries and research, presence at industry events, and participation in a recent Gartner analyst briefing. This research is not intended to be a comparative evaluation of the service providers discussed here, or intended to be an exhaustive list. As such, it does not cover all available service providers in the market.

Clients should note that there are many hundreds of service firms worldwide offering data and analytics services. Each provider in this sample list has its own strengths and weaknesses, with some more suitable to particular types of engagements and clients/industries than others. The research is suitable for clients looking for best-of-breed providers for a specific function, domain, application, industry, geography or technology.

Many capable providers (not included in this study due to our methodology) may be a better fit for specific data and analytics implementation projects, depending on factors that include module, resourcing objectives, size of project and geography.

As part of the research for this Market Guide, Gartner reached out to a sample of data and analytics service providers (55) to respond to a short survey about their capabilities. In total, 38 vendors responded to the survey, sharing information like geographic presence, industries and business domains supported, and software vendor expertise. These data and analytics ESPs were also asked to confirm their support for a number of data and analytics categories.

The following definitions relate to the information contained in Table 1:

- Company size (D&A FTE) refers to the approximate number/range of full-time equivalents (FTEs) employed by the ESP for data and analytics. Figures are subject to change since the time information was first collected.
- Regional presence refers to the regions in which each ESP exhibits some presence through regional offices or dedicated regional sales or support staff. This list is not exhaustive. For the purpose of this research, we have divided the regions into five broad segments: North America; Latin America; Europe, the Middle East and Africa (EMEA); Asia/Pacific (APAC); and India. APAC covers all countries in the region including Japan, Australia and New Zealand. EMEA covers the entire Russian, European and African subcontinents. We have singled out India from APAC as it is a dominant offshore location for many vendors.

Table 1. Regional Presence and Company Size

| ESP | HQ | North America | LATAM | APAC | EMEA (including U.K.) | India | Company Size (D&A FTE) |
|---|---|---|---|---|---|---|---|
| Absolutdata | San Francisco, California, U.S. | ✗ | ✗ | ✗ | ✗ | | 500 |
| Acuvate | Hyderabad, India | ✗ | | | ✗ | ✗ | 45 |
| Affine Analytics | New York, U.S. | ✗ | | ✗ | | ✗ | 400 |
| Analytics8 | Chicago, Illinois, U.S. | ✗ | | ✗ | ✗ | | 150 |
| AwareServices | Sydney, Australia | | | ✗ | | | 23 |
| Axis Group | New Jersey, U.S. | ✗ | | | | | 150 |
| BCG | Boston, Massachusetts, U.S. | ✗ | ✗ | ✗ | ✗ | ✗ | 800-1,000 |
| BearingPoint | Amsterdam, The Netherlands | | | | ✗ | | 450 |
| BRIDGEi2i | Bangalore, India | ✗ | | ✗ | | ✗ | 380 |
| Business&Decision | Paris, France | ✗ | | | ✗ | | 2,100 |
| Caserta | New York, U.S. | ✗ | | | | | 65 |
| Clarity Insights | Chicago, Illinois, U.S. | ✗ | | | | | 400 |
| Datamatics | Mumbai, India | ✗ | | | | ✗ | 283 |
| EPAM | New Town, Pennsylvania, U.S. | ✗ | ✗ | ✗ | ✗ | ✗ | 4,100 |
| EXL | New York, U.S. | ✗ | ✗ | ✗ | ✗ | | 4,300 |
| Fractal Analytics | New York, U.S. | ✗ | | ✗ | ✗ | ✗ | 1,100 |
| Gramener | New Jersey, U.S. | ✗ | | ✗ | ✗ | ✗ | 160 |
| InfoCepts | Nagpur, India | ✗ | | ✗ | ✗ | ✗ | 780 |
| Kavi Global | Illinois, U.S. | ✗ | | | | | 40 |
| KPI Partners | Newark, California, U.S. | ✗ | | | | ✗ | 300 |

| ESP | HQ | North America | LATAM | APAC | EMEA (including U.K.) | India | Company Size (D&A FTE) |
|---|---|---|---|---|---|---|---|
| Kx | Newry, Northern Ireland | ✗ | | ✗ | ✗ | | 1,000 |
| LatentView Analytics | New Jersey, U.S. | ✗ | | ✗ | ✗ | ✗ | 650 |
| LTI | Mumbai, India | ✗ | ✗ | ✗ | ✗ | ✗ | 3,700 |
| Lymbyc | Bangalore, India | ✗ | | | | ✗ | 45 |
| McKinsey Digital | New York, U.S. | ✗ | ✗ | ✗ | ✗ | | 4,000 |
| Mindtree | Bangalore, India | ✗ | | ✗ | ✗ | ✗ | 1,590 |
| Mphasis | Bangalore, India | ✗ | ✗ | ✗ | ✗ | ✗ | 2,200 |
| Neal Analytics | Seattle, Washington, U.S. | ✗ | | | | ✗ | 110 |
| Peak | Manchester, U.K. | | | ✗ | ✗ | | 17 |
| Quanam | Montevideo, Uruguay | ✗ | ✗ | | | | 98 |
| SDG Group | Milan, Italy; Barcelona, Spain | ✗ | | | ✗ | | 1,050 |
| Slalom | Seattle, Washington, U.S. | ✗ | | | ✗ | | 1,290 |
| Tessella | Abingdon, U.K. | ✗ | | | ✗ | | 363 |
| Tiger Analytics | Santa Clara, U.S. | ✗ | | | | ✗ | 350 |
| Tredence | San Jose, U.S. | ✗ | | | ✗ | ✗ | 480 |
| VIQTOR DAVIS | Amsterdam, The Netherlands | ✗ | | | ✗ | ✗ | 312 |
| WNS | Mumbai, India | ✗ | ✗ | ✗ | ✗ | ✗ | 2,700 |
| D&A = data and analytics; ESP = external service provider; FTE = full-time equivalent | | | | | | | |

Source: Gartner (June 2019)

Table 2 lists the top five major industries/verticals supported by each services firm. This is not an exhaustive list. Many service providers cover more than just these five.

Table 2. Major Industries/Verticals Supported

| ESP Top Five Verticals | Automotive | Aerospace | Banking & Financial Services | Consumer Products | Healthcare | Higher Education | High Tech | Hospitality | Industrial Machinery, Components | Insurance | Life Sciences | Manufacturing | Media | Not for Profit | Oil & Gas | Retail | Pharma | Public & Government | Transport & Logistics | Telecommunications | Travel | Utilities & Energy |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Absolutdata | | | | ✗ | | | ✗ | | | | | | | | | ✗ | | | | ✗ | ✗ | |
| Acuvate | | | | ✗ | | | | | | | | | | | | | | | | | | |
| Affine Analytics | | | ✗ | ✗ | | | ✗ | | | ✗ | | | | | | ✗ | | | | | | |
| Analytics8 | | | ✗ | | | | | | | ✗ | ✗ | ✗ | | | | | | | ✗ | | | |
| AwareServices | | | ✗ | ✗ | | | | | | ✗ | | | | ✗ | | | | | | | | ✗ |
| Axis Group | | | ✗ | | ✗ | | | | | | | ✗ | | | | | ✗ | | | ✗ | | |
| BCG | | | ✗ | ✗ | | | | | | | | | | | ✗ | ✗ | | | ✗ | | | |
| BearingPoint | ✗ | | ✗ | ✗ | | | | | | | | ✗ | | | | ✗ | | | | | | |
| BRIDGEi2i | | | ✗ | ✗ | | | ✗ | | | ✗ | | ✗ | | | | | | | | | | |
| Business&Decision | | | ✗ | | | | | | | | ✗ | | | | | ✗ | | ✗ | ✗ | | | |
| Caserta | | | ✗ | | ✗ | ✗ | | | | ✗ | | | ✗ | | | | | | | | | |

| ESP Top Five Verticals | Automotive | Aerospace | Banking & Financial Services | Consumer Products | Healthcare | Higher Education | High Tech | Hospitality | Industrial Machinery, Components | Insurance | Life Sciences | Manufacturing | Media | Not for Profit | Oil & Gas | Retail | Pharma | Public & Government | Transport & Logistics | Telecommunications | Travel | Utilities & Energy |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Clarity Insights | | | ✗ | ✗ | ✗ | | ✗ | | | ✗ | | | | | | | | | | | | |
| Datamatics | | | ✗ | | | | ✗ | | | | | ✗ | | | | ✗ | | | ✗ | | | |
| EPAM | | | ✗ | | ✗ | | ✗ | | | | | | ✗ | | | ✗ | | | | | | |
| EXL | | | ✗ | | ✗ | | | | | ✗ | | | ✗ | | | ✗ | | | | | | |
| Fractal Analytics | | | ✗ | ✗ | | | | | | ✗ | ✗ | | | | | | | | | ✗ | | |
| Gramener | | | ✗ | | | | ✗ | | | | | | ✗ | | | | ✗ | ✗ | | | | |
| InfoCepts | | | ✗ | | | | ✗ | | | | | | ✗ | | | ✗ | ✗ | | | | | |
| Kavi Global | | | | | ✗ | ✗ | ✗ | | | | ✗ | | | | | | | | | | | |
| KPI Partners | | | | | ✗ | | ✗ | | | | | ✗ | | | ✗ | | | | | | | ✗ |
| Kx | ✗ | | ✗ | | | | | | | | | ✗ | | | | | | | | ✗ | | ✗ |
| LatentView Analytics | | | ✗ | ✗ | | | ✗ | | | ✗ | | | | | | ✗ | | | | | | |

| ESP Top Five Verticals | Automotive | Aerospace | Banking & Financial Services | Consumer Products | Healthcare | Higher Education | High Tech | Hospitality | Industrial Machinery, Components | Insurance | Life Sciences | Manufacturing | Media | Not for Profit | Oil & Gas | Retail | Pharma | Public & Government | Transport & Logistics | Telecommunications | Travel | Utilities & Energy |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| LTI | | | ✗ | | | | | | | ✗ | | ✗ | | | | | ✗ | ✗ | | | | |
| Lymbyc | | | ✗ | ✗ | ✗ | | | | | | ✗ | | | | | ✗ | | | | | | |
| McKinsey Digital | | | ✗ | ✗ | ✗ | | ✗ | | | | | ✗ | | | | | | | | | ✗ | |
| Mindtree | | | | ✗ | | | ✗ | | | ✗ | | | | | | ✗ | | | | | ✗ | |
| Mphasis | | | ✗ | | ✗ | | | | | ✗ | | | | | | | | | | | ✗ | ✗ |
| Neal Analytics | | | | ✗ | ✗ | | ✗ | | | | | | | | | ✗ | | | | | | ✗ |
| Peak | | | | ✗ | | | | | | | | ✗ | | | | ✗ | | | ✗ | | | |
| Quanam | | | ✗ | | | | | | | ✗ | | | | | | | | ✗ | | ✗ | | ✗ |
| SDG Group | ✗ | | ✗ | ✗ | | | | | | | | | | | | ✗ | ✗ | | | | | |
| Slalom | | | ✗ | | ✗ | | ✗ | | | | | ✗ | | | | ✗ | | | | | | |
| Tessella | | | | ✗ | | | | | | | ✗ | | | | ✗ | | | ✗ | | ✗ | | |

| ESP Top Five Verticals | Automotive | Aerospace | Banking & Financial Services | Consumer Products | Healthcare | Higher Education | High Tech | Hospitality | Industrial Machinery, Components | Insurance | Life Sciences | Manufacturing | Media | Not for Profit | Oil & Gas | Retail | Pharma | Public & Government | Transport & Logistics | Telecommunications | Travel | Utilities & Energy |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Tiger Analytics | | | ✗ | ✗ | | | | | | ✗ | | | | | | ✗ | | | ✗ | | | |
| Tredence | | | | ✗ | | | ✗ | ✗ | ✗ | | | | | | | ✗ | | | | | | |
| VIQTOR DAVIS | | | ✗ | ✗ | | | | | | ✗ | | | | | | ✗ | | ✗ | | | | |
| WNS | | | ✗ | ✗ | ✗ | | | | | ✗ | ✗ | | | | | | | | | | | |

Source: Gartner (June 2019)

Table 3 lists the top five major business processes/domains supported by each services firm. This is not an exhaustive list. Many service providers cover more than just these five.

Table 3. Major Horizontals/Domains Supported

| ESP Top Five Horizontals | Audit & Governance | Business Process | B2B CRM | CRM/Customer Journey | E-Commerce | Field Service | Finance & CPM | Fraud & Security | Governance (Data Governance) | HR & Workplace | IT Processes | Marketing | Payments | Risk Management & Compliance | Sales | Social Media | Supply Chain | Quality Assurance | Web Analytics |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Absolutdata | | | ✗ | ✗ | | | | | | | | ✗ | | | ✗ | | ✗ | | |
| Acuvate | | | | | ✗ | | | | | | ✗ | ✗ | | | ✗ | | ✗ | | |
| Affine Analytics | | | | ✗ | ✗ | ✗ | | | | | | ✗ | | | | | ✗ | | |
| Analytics8 | | | | | | | ✗ | | | ✗ | | ✗ | | | ✗ | | ✗ | | |
| AwareServices | | | ✗ | ✗ | | ✗ | | | | | | | | ✗ | ✗ | | | | |
| Axis Group | | | | | | ✗ | ✗ | | | | ✗ | | | | ✗ | | ✗ | | |
| BCG | | | | ✗ | ✗ | | | ✗ | | | | | | | ✗ | | ✗ | | |
| BearingPoint | | | | | | | ✗ | | | | | | | ✗ | ✗ | ✗ | ✗ | | |
| BRIDGEi2i | | | | ✗ | | | | | | | | ✗ | | ✗ | ✗ | | ✗ | | |
| Business&Decision | | | | ✗ | | | ✗ | | ✗ | | | ✗ | | ✗ | | | | | |
| Caserta | ✗ | | | ✗ | | | ✗ | | | | ✗ | | | | | | | | ✗ |

| ESP Top Five Horizontals | Audit & Governance | Business Process | B2B CRM | CRM/Customer Journey | E-Commerce | Field Service | Finance & CPM | Fraud & Security | Governance (Data Governance) | HR & Workplace | IT Processes | Marketing | Payments | Risk Management & Compliance | Sales | Social Media | Supply Chain | Quality Assurance | Web Analytics |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Clarity Insights | | | | ✗ | | | ✗ | ✗ | | | | | | ✗ | ✗ | | | | |
| Datamatics | | | | ✗ | | | ✗ | | | ✗ | | | | | ✗ | | ✗ | | |
| EPAM | | | ✗ | | ✗ | | | | | | ✗ | | | ✗ | | | ✗ | | |
| EXL | | | | ✗ | | | | | | | | ✗ | | ✗ | | ✗ | | | ✗ |
| Fractal Analytics | | | | ✗ | | | | | | | | ✗ | | | ✗ | ✗ | ✗ | | |
| Gramener | | | | ✗ | | | ✗ | | | | | ✗ | | | | ✗ | ✗ | | |
| InfoCepts | | | | | ✗ | | | | | ✗ | ✗ | | | | ✗ | | | | ✗ |
| Kavi Global | | ✗ | | | | ✗ | ✗ | | | | | | | | | | ✗ | | |
| KPI Partners | | | | | | | ✗ | | | ✗ | | ✗ | | | ✗ | | ✗ | | |
| Kx | | | | | | | ✗ | | ✗ | | ✗ | | | ✗ | | | | ✗ | |
| LatentView Analytics | | | | ✗ | ✗ | | | | | ✗ | | ✗ | | | | | ✗ | | |
| LTI | | | | ✗ | | | ✗ | ✗ | | | | | | ✗ | | | ✗ | | |

| ESP Top Five Horizontals | Audit & Governance | Business Process | B2B CRM | CRM/Customer Journey | E-Commerce | Field Service | Finance & CPM | Fraud & Security | Governance (Data Governance) | HR & Workplace | IT Processes | Marketing | Payments | Risk Management & Compliance | Sales | Social Media | Supply Chain | Quality Assurance | Web Analytics |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Lymbyc | | | ✗ | ✗ | ✗ | | | | | | | ✗ | | | ✗ | | | | |
| McKinsey Digital | | | | ✗ | | | | | | | | ✗ | | ✗ | ✗ | | ✗ | | |
| Mindtree | | | | ✗ | ✗ | | | | | | | ✗ | | | ✗ | | | | ✗ |
| Mphasis | | | | ✗ | | | | | | | | ✗ | ✗ | | | | | ✗ | ✗ |
| Neal Analytics | | | | | | | ✗ | | | | ✗ | ✗ | | | | | ✗ | ✗ | |
| Peak | | | | ✗ | ✗ | | | | | | | ✗ | | | ✗ | | ✗ | | |
| Quanam | | | | ✗ | | | ✗ | | | | | ✗ | ✗ | | ✗ | | | | |
| SDG Group | | | | ✗ | | | ✗ | | | | | ✗ | | | ✗ | | ✗ | | |
| Slalom | | | | ✗ | | | | | | ✗ | | ✗ | | | ✗ | | | | |
| Tessella | | | | ✗ | | | | | | | ✗ | ✗ | | ✗ | | | | ✗ | |
| Tiger Analytics | | | ✗ | ✗ | | | | | | | | ✗ | | | ✗ | | ✗ | | |
| Tredence | | | | ✗ | | | | | | | | ✗ | | | ✗ | | ✗ | | ✗ |

| ESP Top Five Horizontals | Audit & Governance | Business Process | B2B CRM | CRM/Customer Journey | E-Commerce | Field Service | Finance & CPM | Fraud & Security | Governance (Data Governance) | HR & Workplace | IT Processes | Marketing | Payments | Risk Management & Compliance | Sales | Social Media | Supply Chain | Quality Assurance | Web Analytics |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| VIQTOR DAVIS | ✗ | | | ✗ | ✗ | | | ✗ | | | | | | | | | ✗ | | |
| WNS | | | | ✗ | | | ✗ | | | | | ✗ | | | | ✗ | ✗ | | |

Source: Gartner (June 2019)

Tables 4 and 5 list the major data and analytics platforms or vendors supported by each provider. This is not an exhaustive list and contains only a selection of five vendors and/or platforms from the list provided by the ESPs. The term "not publicly available," as shown, does not mean that the service provider is without a particular attribute or capability. Rather, it means that this information was not available to Gartner at the time of publishing this research.

Table 4. Major Data and Analytics Platforms or Vendors Supported (Part 1)

| ESP Top Five Partnerships | Alteryx | AWS | C3.ai | Cloudera | Colibra | Contify | Databricks | DataRobot | Denodo | Esgyn | Experian | GCP | H2O.ai | Horton Works | IBM | Informatica | Looker | MapR |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Absolutdata | | ✗ | | | | | | | | | | | | | ✗ | | | |
| Acuvate | | | | | | | | | | | | | | | | | | |
| Affine Analytics | | | | | | | | | | | | | | | | | | |
| Analytics8 | | | | | | | | ✗ | | | | | | | | | | |
| AwareServices | ✗ | | | | | | | | ✗ | | | | | | | | | |
| Axis Group | | | | | | | | | | | | | | | | | | |
| BCG | | | | | | | | | | | | | | | | | | |
| BearingPoint | | ✗ | | | | | | | | | | | | | ✗ | | | |
| BRIDGEi2i | | ✗ | | | | ✗ | | | | | | | | | | | | |
| Business&Decision | | | | | | | | | | | | | | | ✗ | | | |
| Caserta | | ✗ | | | | | ✗ | | | | | ✗ | | | | | | |
| Clarity Insights | | ✗ | | | | | ✗ | | | | | | | | | | | |
| Datamatics | | ✗ | | ✗ | | | | | | | | | | | ✗ | | | ✗ |
| EPAM | | ✗ | | | | | | | | | | ✗ | | | | | | |

| ESP Top Five Partnerships | Alteryx | AWS | C3.ai | Cloudera | Colibra | Contify | Databricks | DataRobot | Denodo | Esgyn | Experian | GCP | H2O.ai | Horton Works | IBM | Informatica | Looker | MapR |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EXL | | | | | ✗ | | | | | | | | | | | ✗ | | |
| Fractal Analytics | | ✗ | | | | | | | | | | ✗ | | | | | | |
| Gramener | | | | | | | | | | | | | | | | | | |
| InfoCepts | | | | | | | | | | | | | | | | ✗ | | |
| Kavi Global | | ✗ | | | | | | | | | | ✗ | | | | | | |
| KPI Partners | | ✗ | | | | | | | | | | | | | | | | |
| Kx | | ✗ | | | | | | | | | | ✗ | ✗ | | | | | |
| LatentView Analytics | | ✗ | | | | | | | | | | ✗ | | | | | ✗ | |
| LTI | | ✗ | | | | | | | | | | ✗ | | | | | | |
| Lymbyc | | | | | | | | | | | | | | | | | | |
| McKinsey Digital | | | | | | | | | | | | | | | | | | |
| Mindtree | | ✗ | | ✗ | | | ✗ | | | | | | | | | ✗ | | |
| Mphasis | | ✗ | | | | | | | | ✗ | | ✗ | | | | | | |
| Neal Analytics | | ✗ | ✗ | | | | ✗ | | | | | | | | | | | |
| Peak | | ✗ | | | | | | | | | | | | | | | | |

| ESP Top Five Partnerships | Alteryx | AWS | C3.ai | Cloudera | Colibra | Contify | Databricks | DataRobot | Denodo | Esgyn | Experian | GCP | H2O.ai | Horton Works | IBM | Informatica | Looker | MapR |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Quanam | | | | ✗ | | | | | | | | | | ✗ | ✗ | | | |
| SDG Group | | | | | | | | | | | | | | | ✗ | | | |
| Slalom | | ✗ | | | | | | | | | | ✗ | | | | | | |
| Tessella | | ✗ | | | | | | | | | | | | | | | | |
| Tiger Analytics | | ✗ | | | | | | | | | | ✗ | | ✗ | | | | |
| Tredence | | | | | | | | | | | | ✗ | | | | | | |
| VIQTOR DAVIS | | ✗ | | | | | | | | | | | | | ✗ | ✗ | | |
| WNS | | ✗ | | | | | | | | | | | | | | | | |

Source: Gartner (June 2019)

Table 5. Major Data and Analytics Platforms or Vendors Supported (Part 2)

| ESP Top Five Partnerships | Microsoft | MicroStrategy | MongoDB | Oracle | Own Platform | Qlik | SAS | Salesforce | SAP | Snowflake | Tableau | Talend | ThoughtSpot | TIBCO Software | TimeXtender | Unifi | Waterline Data | Not Publicly Available |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Absolutdata | | | | | | | | | | | | | | | | | | |
| Acuvate | ✗ | | | | | | | | | | | | | | | | | |
| Affine Analytics | ✗ | | | | | | | | | | | | | ✗ | | | | |
| Analytics8 | ✗ | | | | | ✗ | | | | ✗ | | | ✗ | | | | | |
| AwareServices | | | | | | | | ✗ | | ✗ | ✗ | | | | | | | |
| Axis Group | | | | | | ✗ | | | | | ✗ | | ✗ | | | ✗ | | |
| BCG | | | | | | | | | | | | | | | | | | ✗ |
| BearingPoint | ✗ | | | ✗ | | | | | ✗ | | | | | | | | | |
| BRIDGEi2i | | | | | | | | ✗ | | | | | | | | | | |
| Business&Decision | ✗ | | | | | ✗ | ✗ | | | | ✗ | | | | | | | |
| Caserta | | | | | | | | | | ✗ | | | | | | | | |
| Clarity Insights | ✗ | | | | | | | | | ✗ | | ✗ | | | | | | |
| Datamatics | ✗ | | | | | | | | | | | | | | | | | |

| ESP Top Five Partnerships | Microsoft | MicroStrategy | MongoDB | Oracle | Own Platform | Qlik | SAS | Salesforce | SAP | Snowflake | Tableau | Talend | ThoughtSpot | TIBCO Software | TimeXtender | Unifi | Waterline Data | Not Publicly Available |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| EPAM | ✗ | | | | | | | | ✗ | | | | | | | | | |
| EXL | | | | | | | ✗ | | | ✗ | ✗ | | | | | | | |
| Fractal Analytics | ✗ | | | | | | | | | | | | | | | | | |
| Gramener | ✗ | | | | | | | | | | | | | | | | | |
| InfoCepts | ✗ | ✗ | | | | ✗ | | | | ✗ | | | | | | | | |
| Kavi Global | ✗ | | | | | | ✗ | | | | | | | | | | | |
| KPI Partners | ✗ | | | ✗ | | | | | ✗ | | ✗ | | | | | | | |
| Kx | | | | | | | | | | | | | | | | | | |
| LatentView Analytics | ✗ | | | | | | | | | | ✗ | | | | | | | |
| LTI | ✗ | | | | | ✗ | | | | ✗ | | | | | | | | |
| Lymbyc | | | | | ✗ | | | | | | | | | | | | | ✗ |
| McKinsey Digital | | | | | | | | | | | | | | | | | | ✗ |
| Mindtree | ✗ | | | | | | | | | | | | | | | | | |
| Mphasis | ✗ | | | | | | | | | | | | | | | | ✗ | |

| ESP Top Five Partnerships | Microsoft | MicroStrategy | MongoDB | Oracle | Own Platform | Qlik | SAS | Salesforce | SAP | Snowflake | Tableau | Talend | ThoughtSpot | TIBCO Software | TimeXtender | Unifi | Waterline Data | Not Publicly Available |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Neal Analytics | ✗ | | ✗ | | | | | | | | | | | | | | | |
| Peak | ✗ | | | | | | | | | | | | | | | | | |
| Quanam | | | | ✗ | | | | | | | | | | | | | | |
| SDG Group | ✗ | | | | | ✗ | | | ✗ | | ✗ | | | | | | | |
| Slalom | ✗ | | | | | | | ✗ | | | ✗ | | | | | | | |
| Tessella | ✗ | | | | | | | | | | | | | | | | | |
| Tiger Analytics | ✗ | | | | | | ✗ | | | | | | | | | | | |
| Tredence | ✗ | | | | | | | | | ✗ | ✗ | | | | | | | |
| VIQTOR DAVIS | ✗ | | | | | | | | | | | | | ✗ | | | | |
| WNS | ✗ | | | | | | | | | | | | | | | | | |

Source: Gartner (June 2019)

Clients are advised and encouraged to investigate the ESPs separately based on their preferences, including regions supported, size of organization, scope of the project, vertical industries supported, or any other factors deemed important by the organization.

Tables 6 and 7 list, respectively, the data and analytics categories supported by each ESP to match your specific use case. These categories could be data and analytics strategy, data governance, data lake enablement, or different types of analytics or analytical applications

Table 6. Data Supported

| ESP | Data Strategy, Roadmap | Data Architecture | Data Engineering | Data Governance | Data Integration | Data Migration | Data Quality | Metadata Management/ Data Catalog | Reference & Master Data Management | Data Warehousing | Data Lake |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Absolutdata | ✗ | ✗ | ✗ | | ✗ | | | | ✗ | ✗ | ✗ |
| Acuvate | | ✗ | | | ✗ | ✗ | ✗ | | | ✗ | ✗ |
| Affine Analytics | | | | | | | | | | | |
| Analytics8 | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | | | ✗ | ✗ |
| AwareServices | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | | ✗ | ✗ | ✗ |
| Axis Group | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| BCG | ✗ | ✗ | ✗ | ✗ | | | ✗ | ✗ | | | ✗ |
| BearingPoint | ✗ | ✗ | ✗ | | ✗ | | ✗ | | | ✗ | ✗ |
| BRIDGEi2i | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | | ✗ | ✗ | ✗ |
| Business&Decision | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Caserta | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Clarity Insights | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Datamatics | ✗ | ✗ | ✗ | ✗ | ✗ | | | | ✗ | ✗ | ✗ |
| EPAM | ✗ | ✗ | ✗ | | ✗ | ✗ | | | | ✗ | ✗ |

| ESP | Data Strategy, Roadmap | Data Architecture | Data Engineering | Data Governance | Data Integration | Data Migration | Data Quality | Metadata Management/ Data Catalog | Reference & Master Data Management | Data Warehousing | Data Lake |
|---|---|---|---|---|---|---|---|---|---|---|---|
| EXL | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Fractal Analytics | ✗ | ✗ | ✗ | | ✗ | | | | | ✗ | ✗ |
| Gramener | ✗ | | | | ✗ | | | | | | |
| InfoCepts | ✗ | ✗ | | ✗ | ✗ | ✗ | ✗ | ✗ | | ✗ | ✗ |
| Kavi Global | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| KPI Partners | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Kx | | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | |
| LatentView Analytics | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| LTI | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Lymbyc | ✗ | | ✗ | | ✗ | ✗ | ✗ | | | | |
| McKinsey Digital | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Mindtree | ✗ | | ✗ | | ✗ | | | ✗ | | | ✗ |
| Mphasis | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Neal Analytics | ✗ | ✗ | ✗ | | ✗ | ✗ | ✗ | | | ✗ | ✗ |
| Peak | ✗ | | ✗ | | ✗ | | | | | ✗ | ✗ |

| ESP | Data Strategy, Roadmap | Data Architecture | Data Engineering | Data Governance | Data Integration | Data Migration | Data Quality | Metadata Management/ Data Catalog | Reference & Master Data Management | Data Warehousing | Data Lake |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Quanam | ✗ | ✗ |  | ✗ | ✗ | ✗ | ✗ |  | ✗ | ✗ | ✗ |
| SDG Group | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Slalom |  | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Tessella | ✗ | ✗ | ✗ | ✗ | ✗ |  | ✗ | ✗ |  |  |  |
| Tiger Analytics | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |  | ✗ | ✗ | ✗ |
| Tredence |  |  | ✗ |  | ✗ |  |  | ✗ | ✗ | ✗ | ✗ |
| VIQTOR DAVIS | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| WNS | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |  | ✗ | ✗ | ✗ |

Source: Gartner (June 2019)

Table 7. Analytics Supported

| ESP | Analytics Strategy, Roadmap | Business Consulting and Advisory | Operational Intelligence | Business Intelligence | Descriptive Analytics | Diagnostic Analytics | Predictive Analytics | Prescriptive Analytics | AI (Data Science & Machine Learning) | Analytical Applications/ Packaged Solutions |
|---|---|---|---|---|---|---|---|---|---|---|
| Absolutdata | ✗ | | | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Acuvate | | ✗ | | ✗ | | | ✗ | ✗ | ✗ | ✗ |
| Affine Analytics | | | | | | | | | | |
| Analytics8 | ✗ | ✗ | | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| AwareServices | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | |
| Axis Group | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| BCG | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| BearingPoint | ✗ | ✗ | | ✗ | | ✗ | ✗ | | | ✗ |
| BRIDGEi2i | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Business&Decision | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Caserta | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | |
| Clarity Insights | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Datamatics | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| EPAM | ✗ | ✗ | | ✗ | | | | | ✗ | ✗ |

| ESP | Analytics Strategy, Roadmap | Business Consulting and Advisory | Operational Intelligence | Business Intelligence | Descriptive Analytics | Diagnostic Analytics | Predictive Analytics | Prescriptive Analytics | AI (Data Science & Machine Learning) | Analytical Applications/ Packaged Solutions |
|---|---|---|---|---|---|---|---|---|---|---|
| EXL | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Fractal Analytics | ✗ | ✗ | | ✗ | ✗ | | ✗ | | ✗ | |
| Gramener | ✗ | | | | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| InfoCepts | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | | ✗ | ✗ |
| Kavi Global | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| KPI Partners | ✗ | | ✗ | ✗ | ✗ | | ✗ | ✗ | ✗ | ✗ |
| Kx | | | ✗ | ✗ | ✗ | ✗ | ✗ | | ✗ | |
| LatentView Analytics | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| LTI | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Lymbyc | | | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| McKinsey Digital | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | |
| Mindtree | ✗ | | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Mphasis | ✗ | | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Neal Analytics | ✗ | ✗ | | ✗ | ✗ | ✗ | ✗ | | ✗ | ✗ |
| Peak | ✗ | | | | | | ✗ | ✗ | ✗ | ✗ |

| ESP | Analytics Strategy, Roadmap | Business Consulting and Advisory | Operational Intelligence | Business Intelligence | Descriptive Analytics | Diagnostic Analytics | Predictive Analytics | Prescriptive Analytics | AI (Data Science & Machine Learning) | Analytical Applications/ Packaged Solutions |
|---|---|---|---|---|---|---|---|---|---|---|
| Quanam | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| SDG Group | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Slalom | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Tessella | ✗ | ✗ | | | ✗ | ✗ | ✗ | ✗ | ✗ | |
| Tiger Analytics | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ |
| Tredence | ✗ | | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | | ✗ |
| VIQTOR DAVIS | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | |
| WNS | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | ✗ | | ✗ | ✗ |

Source: Gartner (June 2019)

## Market Recommendations

The continued rise in the adoption of data and analytics in digital business has changed how customers engage with service providers (see "Build Your Digital Business Platform Around Data and Analytics"). Data and analytics leaders are increasingly selecting service providers that can deliver more sophisticated means of analytic insight. They are also choosing those that can help them shape and make optimal decisions, and engage in best-practice approaches and packaged solutions to address a wide range of use cases.

Clients can benefit from the increased number of solutions, services and vendors. However, they must also be careful that their chosen provider is able to sufficiently support new data and analytics demand and technologies. Gartner anticipates continued strong demand for data and analytics services during the next year, but expects the growth rate to be less than that witnessed in previous years.

For data and analytics leaders:

- Work closely with business leaders to identify applicable use cases. Perform a thorough assessment of your internal data and analytics capabilities to determine which provider is the best fit for your overall data and analytics program (for example, using Gartner's "IT Score for Data & Analytics").
- Consider separating strategy work from technology implementation for better governance and, potentially, engage the strategy partner as a quality assurance throughout the implementation.
- Evaluate the benefits of working with multiple service providers if your vendor management maturity is high. Consider each for its own expertise and/or partition the work into readily manageable segments, each with its own statement of work, even if the same provider is used.
- Conduct a formal RFP to ensure you select the provider with the right set of competencies to deliver on your organization's current and future business requirements. As part of the RFP process, request for industry/function/domain-specific use cases, references and sample deliverables.
- Conduct a formal initial proof of concept (POC) to ensure providers can deliver the expected value before committing to a long-term contract (see "How Chief Data Officers Can Scale the Value of Data and Analytics by Working With External Service Providers").
- Use this Market Guide to identify, evaluate and engage with a starting list of candidate providers that are a best fit for your engagement's scope and your company's size and needs.
- Seek data and analytics providers that develop repeatable methods and reusable data and analytic frameworks that complement the provisioning of skilled resources. This accelerates time to value and contributes to solution quality and resilience.
- Ensure the statement of work (SOW) requires that the ESP provides appropriate coaching and knowledge transfer to your internal employees. Doing so will mean that your organization can take ownership and management of the analytics assets once they have been deployed.

### Acronym Key and Glossary Terms

| | |
|---|---|
| **BI** | business intelligence |
| **BPO** | business process outsourcing |
| **ESP** | external service provider |
| **CAO** | chief analytics officer |
| **CDO** | chief data officer |
| **POC** | proof of concept |
| **SI** | system integrator |
| **SOW** | statement of work |

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

"Magic Quadrant for Data and Analytics Service Providers, Worldwide"

"Critical Capabilities for Data and Analytics Service Providers, Worldwide"

"How Chief Data Officers Can Scale the Value of Data and Analytics by Working With External Service Providers"

"Start Monetizing Data and Analytics With Your Service Provider Now"

"Take Advantage of the Disruptive Convergence of Analytic Services and Software"

"How IT Must Work With Business to Ensure Analytics and BI Alignment"

"IT Score for Data & Analytics"

### Evidence

[1] In preparing this research, Gartner used a combination of secondary research, vendor surveys, industry research, client interactions, vendor briefings, publicly available information and other academic publications to create a map of major data and analytics service providers and trends in the market.

**The State and Future of the Office of the CDO: Gartner 2018 Chief Data Officer Survey** was conducted online from September through December 2018, with 257 data and analytics leaders from across the world. The purpose of the survey was to test a set of hypotheses in order to understand how this rapidly growing business function is maturing, and to understand the resulting business impact.

To participate in the study, respondents were required to have the title of CDO or CAO, or to have the responsibilities of an executive level data and analytics leader in their organization (in the case of organizations without an official C-level data and analytics title). The survey sample was gleaned from a variety of sources (included LinkedIn), with the greatest number coming from a Gartner-curated list of over 2,000 CDOs and other high-level data and analytics leaders.

### Note 1 Representative Vendor Selection

This Market Guide is an update from previous published Market Guides. All service firms are selected based on the services offered and delivered as follows:

- **Presence and geography —** Service providers must exhibit market presence and have evidence of operations in at least one major region. There must also be interest demonstrated by clients for their solutions and offerings, as determined by Gartner.
- **Projects —** Service providers must have the capabilities not just for staffing, but also for managing data and analytics programs across the business analytics framework.
- **Capabilities —** Service providers must deliver projects that include a variety of disciplines such as data and analytics strategy and consulting, implementation and managed services. A comprehensive set of functional capabilities is defined in "Critical Capabilities for Data and Analytics Service Providers, Worldwide."
- **Innovation —** Service providers should consistently invest in methodology and internal processes, as well as in resource development and staying relevant with technology and tools.
- **Assets and intellectual property (IP) —** Service providers should have either created or be developing domain/vertical, industry-specific packaged offerings, business analytics frameworks and IP.
- **Business models —** Service providers must be flexible in how they deliver projects and value to clients. For example, some ESPs offer agile business models based on prototyping and short sprints, while others offer black-box insights via a cloud-based "as a service" model.

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