

# Analytics Services

## Data Science Services – Specialist Analytics Providers

A research report evaluating data analytics service providers' strengths, challenges and competitive differentiators

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Executive Summary	03	<b>Data Science</b>	
Provider Positioning	07	<b>Services – Specialist</b>	
Introduction		<b>Analytics Providers</b>	16 – 22
Definition	12	Who Should Read This	17
Scope of Report	14	Quadrant	18
Provider Classifications	15	Definition & Eligibility Criteria	19
		Observations	20
		Provider Profile	22
Appendix			
Methodology & Team	24		
Author & Editor Biographies	25		
About Our Company & Research	26		

Report Author: Gowtham Kumar Sampath

### **Analytics services are driven by enterprise data centrality**

The demand for analytics solutions and services has gained significant traction in the U.S., given the growing realization among enterprises that they need to leverage data for driving their business objectives. The market reflects global trends in terms of IT and digital maturity, and analytics solutions act as a hub for centralized business decision-making for several enterprises.

The market is on the cusp of the realization that data and analytics are not only central and core to the successful performance of businesses but are central to their survival. The role of data has never been more important –there is a need to drive decision making and infuse

analytics for delivering results beyond business expectations. In light of these developments, ISG’s analysis reveals that enterprises are focused on the following:

- Customer centrality: Investment in process and methodologies underpinned by solutions that drive high levels of personalization and customization
- Business centrality: Investment in tools and technologies that combine and augment human-machine collaboration to drive business decisions for operational and process excellence
- Data centrality: Approach and mindset that culturally identifies and understands data as the prime enabler of business, operations and the process to drive employee engagement

Although these seem to be different focus areas, every enterprise must achieve

# Investments in analytics to foster a data-driven culture



optimum levels of harmony between these three facets to grow their businesses. Depending on their level of digital maturity, many enterprises are trying to achieve customer and business-centricity for driving analytics revenues. A handful of large firms and some small niche firms are already operating on high levels of data-centric or data-driven approaches. Some of them include Coca-Cola, Disney, McDonalds, DBS Bank, Uber and technology companies such as Netflix, Google and Apple.

### **Customer experience or customer engagement focus**

This is viewed as an area that is addressable for implementing analytics solutions and yet a challenge for enterprises across several verticals. Hyper-personalization and hyper-customization are becoming important tools for attracting new customers and preventing churn.

- The market is attracting significant investments from enterprises for customer service and customer-related solutions and services. Customer analytics has become a standardized and pre-packaged analytics solution across several large and specialist analytics providers. Service providers are also actively offering analytics solutions covering topics such as customer value, customer experience, customer journey, and customer engagement to better drive enterprise customer strategies.
- Service providers are looking at customer touchpoints including omnichannel AI, IoT and the edge, conversational AI platforms, chatbots, and other social media APIs to derive insights. Increasingly, these touchpoints are becoming embedded with simple and contextual AI capabilities to deliver an enhanced customer experience.
- Service providers are offering readily available and tailored versions of customer 360 and customer data platforms that are designed to address the specific demands of customer experience and management. In addition, the use of customer analytics is also promoting data monetization and data ecosystems that enable better data sharing and new revenue streams with existing data.
- In the U.S., enterprises across retail, telecom, banking, automotive and the public sector are investing in customer-centric solutions and services. Demography, buying behavior, buyer profiles and many data points are evaluated to address customer preferences, customer segmentation, product positioning, pricing and discounts, problem resolution, customer churn and other parameters.

### **Decision science, or intelligent decisioning, is taking center stage**

Enterprises and service providers are starting to consider the business context while investing in analytics solutions and services, rather than viewing it as mere technology or infrastructure element.

- Data science is no longer viewed as the statistical or algorithmic approach that combines AI, machine learning and automation to offer solutions. The approach and projects are leveraged to empower deep intelligence and insights that drive business decisions. In fact, the term data science is slowly fading, with decision science becoming the norm across providers and enterprises.



- Decision science is becoming a critical aspect of most analytics projects for driving business and even life-saving impacts. In the U.S. healthcare industry for example, medical decisions on the treatment of anomalies and the presence of life-threatening illnesses and many other diseases are being handled by sophisticated AI systems that can deliver high accuracy.
- In certain cases, these systems were able to read and diagnose from images with low or poor resolution. In the life sciences and pharmaceutical industry, decision science is being leveraged to create drugs and other pharmacological inventions. In the agriculture sector, these technologies help detect viruses and crop-eating diseases in real time.
- From a business perspective, enterprises across retail, banking, telecom and even technology companies are leveraging data science

and analytics to help them decide store locations, borrower profiles in lending and mortgage, rate fluctuations in utilities and many more advantages. Service providers, especially specialists or pure-play analytics providers, are taking advantage of these opportunities to offer highly customized services and solutions that are vertical- or domain-specific, especially for utilities, banking, telecom and retail.

### **Data literacy growing as an investment**

**area:** In the U.S., the aftermath of the pandemic and threat of a looming recession have created an impending necessity to become data driven, with key executives and business leaders investing to modernize their data infrastructures. Across large, mid-sized and small segments, enterprises also realize that becoming data centric is a steep challenge and can't be realized with just investments in technology. ISG advises that enterprises should invest in fostering

a data-driven culture that impacts every employee and line of business to change perspectives and view data as a lever for business outcomes.

- Enterprises in the U.S. are investing in opportunities for executives and employees that create a shift in their mindsets to drive business with data-led intelligence.
- Aside from offering training, service providers are also employing self-service modules and capabilities in data science, data engineering, data governance and management and business intelligence solutions. These modules enable citizen data scientists, line of business managers and even executives to better capitalize the investment on analytics.
- Data literacy is gaining mindshare and investments across enterprises, including public sector agencies,

emphasizing the need for better data strategy and governance. The Foundations for Evidence-Based Policymaking Act created a U.S. law that requires the federal government to modernize its data management practices. The act also envisages a 10-year national data strategy to encourage data to be used as a strategic asset and the appointment of chief data officers across every federal agency.

The following are some of the key factors disrupting the market dynamics:

- Industrialized solutions continue to gain traction, with service providers offering analytics tools and accelerators built on rich experience from vertical and domain experience.
- Business-outcome-led delivery is a major facet that providers increasingly attach with solutions and services.



## Executive Summary

- Cloud-native solutions and services, as well as cloud migrations, continue to gain traction as enterprises continuously invest in transformation and modernization.
- X-Ops: The analytics market is abuzz with keywords such as AIOps, MLOps, DataOps, DevSecOps, signifying the heightened level of AI productization.
- X-First: Providers are taking a “data-first” approach and marketing their solutions to drive the importance of data, customer, AI and cloud.

Consequently, the market is undergoing aggressive consolidation, with several acquisitions targeted at improving portfolio attractiveness and competitive strength. In addition, there is intense collaboration among providers and vendors to create a robust ecosystem of partners for addressing specialized industry needs, compliance requirements and future-proof solutions.

Customer centricity, business outcomes drive data analytics initiatives.




# Provider Positioning

Page 1 of 5

	Data Science Services - Transformation Service Providers	Data Science Services - Specialist Analytics Providers	Data Engineering Services - Transformation Service Providers	Data Engineering Services - Specialist Analytics Providers	Data Monetization Services
AbsolutData	Not In	Product Challenger	Not In	Product Challenger	Not In
Accenture	Leader	Not In	Leader	Not In	Leader
Algonomy	Not In	Product Challenger	Not In	Product Challenger	Not In
Atos	Leader	Not In	Leader	Not In	Leader
Birlasoft	Product Challenger	Not In	Product Challenger	Not In	Not In
Brillio	Not In	Product Challenger	Not In	Product Challenger	Not In
Capgemini	Leader	Not In	Leader	Not In	Leader
Cognizant	Leader	Not In	Leader	Not In	Leader
Deloitte	Leader	Not In	Leader	Not In	Market Challenger




 Provider Positioning

	<b>Data Science Services - Transformation Service Providers</b>	<b>Data Science Services - Specialist Analytics Providers</b>	<b>Data Engineering Services - Transformation Service Providers</b>	<b>Data Engineering Services - Specialist Analytics Providers</b>	<b>Data Monetization Services</b>
DXC Technology	Market Challenger	Not In	Market Challenger	Not In	Market Challenger
EXL Services	Product Challenger	Not In	Not In	Not In	Not In
EY	Market Challenger	Not In	Market Challenger	Not In	Market Challenger
Fractal	Not In	Leader	Not In	Leader	Not In
Genpact	Leader	Not In	Leader	Not In	Leader
HCLTech	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Hexaware	Product Challenger	Not In	Product Challenger	Not In	Not In
HTC Global	Not In	Not In	Product Challenger	Not In	Not In
IBM	Leader	Not In	Leader	Not In	Leader





 Provider Positioning

	<b>Data Science Services - Transformation Service Providers</b>	<b>Data Science Services - Specialist Analytics Providers</b>	<b>Data Engineering Services - Transformation Service Providers</b>	<b>Data Engineering Services - Specialist Analytics Providers</b>	<b>Data Monetization Services</b>
InData Labs	Not In	Contender	Not In	Contender	Not In
Indium Software	Contender	Not In	Contender	Not In	Not In
Infosys	Leader	Not In	Leader	Not In	Leader
ITC Infotech	Contender	Not In	Contender	Not In	Not In
KPMG	Market Challenger	Not In	Market Challenger	Not In	Market Challenger
LatentView Analytics	Not In	Leader	Not In	Leader	Not In
LTIMindtree	Rising Star ★	Not In	Rising Star ★	Not In	Rising Star ★
Mphasis	Product Challenger	Not In	Contender	Not In	Product Challenger
Mu Sigma	Not In	Product Challenger	Not In	Product Challenger	Not In




## Provider Positioning

Page 4 of 5

	Data Science Services - Transformation Service Providers	Data Science Services - Specialist Analytics Providers	Data Engineering Services - Transformation Service Providers	Data Engineering Services - Specialist Analytics Providers	Data Monetization Services
N-IX	Not In	Contender	Not In	Contender	Not In
Persistent Systems	Contender	Not In	Contender	Not In	Contender
PwC	Market Challenger	Not In	Market Challenger	Not In	Market Challenger
Quantiphi	Not In	Rising Star ★	Not In	Rising Star ★	Not In
SG Analytics	Not In	Contender	Not In	Contender	Not In
TCS	Leader	Not In	Leader	Not In	Leader
Tech Mahindra	Leader	Not In	Leader	Not In	Product Challenger
TheMathCompany	Not In	Product Challenger	Not In	Product Challenger	Not In
ThirdEye Data	Not In	Contender	Not In	Contender	Not In



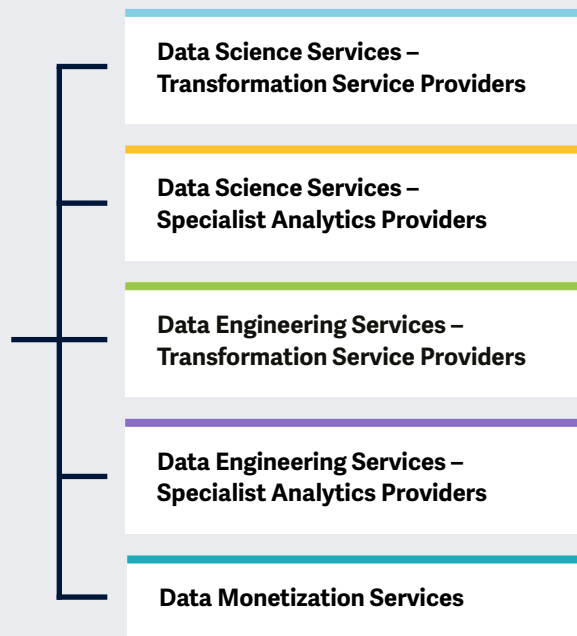
 Provider Positioning

	<b>Data Science Services - Transformation Service Providers</b>	<b>Data Science Services - Specialist Analytics Providers</b>	<b>Data Engineering Services - Transformation Service Providers</b>	<b>Data Engineering Services - Specialist Analytics Providers</b>	<b>Data Monetization Services</b>
Tiger Analytics	Not In	Leader	Not In	Leader	Not In
Tredence	Not In	Leader	Not In	Leader	Not In
Virtusa	Not In	Leader	Not In	Leader	Not In
Wipro	Leader	Not In	Leader	Not In	Product Challenger
WNS	Product Challenger	Not In	Product Challenger	Not In	Product Challenger
Yash Technologies	Not In	Contender	Not In	Contender	Not In
Zensar	Contender	Not In	Contender	Not In	Contender
ZS Associates	Not In	Leader	Not In	Leader	Not In



# This study focuses on what ISG perceives as most critical in 2022 for Analytics Services

Simplified Illustration Source: ISG 2022



## Definition

Analytics is growing in importance, as evident from the significant investments by enterprises on these solutions on their journeys toward becoming data-centric entities. Data analytics is becoming integral to the business approaches and digital transformation initiatives of enterprises. ISG analysis indicates a fundamental shift in the mindsets of large enterprises and small and mid-sized businesses: Analytics is no longer about basic business data; instead, analytics solutions are now deployed to derive business value from data. Enterprises wish to address specific business areas such as decision-making, revenue streams, customer experience, operational excellence and optimized business processes. ISG analysis also indicates that while enterprises differ in the level of maturity with their data and analytics

practices, they are unanimous in the shift to adopting data-driven processes and embracing a data-centric culture.

Compared with 2021, data science services in 2022 have been witnessing significant changes — veering away from statistical modelling and toward business value and decision intelligence. Providers and enterprises expect data scientists to better understand business context and objectives to enhance insights and thereby enable actionable decision making. While technical skills continue to be a prerequisite to a data scientist's role, business knowledge with domain expertise is increasingly being sought to improve business outcomes.

Data engineering services continue to dominate this space with the largest share of revenue and deals, but with a shift from data integration to data fabrics, and adaptive and smart data pipelines. As the focus moves away from simple



integration-related deals, the productized data engineering market is witnessing an increasing number of service-oriented deals and projects.

Data monetization services is a new market segment analyzed in the 2022 edition of this study. It was added because enterprises increasingly require data hubs, data ecosystems and solutions to share data. Data has become key to obtaining multidimensional perspectives across business segments, partners, supply chains, customers and co-innovators.

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

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

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



### Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following five quadrants: Data Science Services – Transformation Service Providers, Data Science Services – Specialist Analytics Providers, Data Engineering Services – Transformation Service Providers, Data Engineering Services – Specialist Analytics Providers and Data Monetization Services.

### Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the

IT 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 IT 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 Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens quadrant may include service providers that ISG believes have 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 Science Services – Specialist Analytics Providers



### Who Should Read This

In this quadrant, ISG evaluates the current positioning of specialist analytics providers offering data science services along with their relative strengths in the U.S. It also evaluates the changing dynamics of data science services offered by these providers in the U.S. These providers use analytics-based methods, processes, algorithms and systems to extract knowledge, patterns and conclusions from both structured and unstructured data.

Enterprises seek data-driven actionable intelligence that will give them a competitive edge and are prioritizing investments in innovative technologies. Decision intelligence and technologies such as cloud computing and AutoML are becoming focus areas for enterprises to improve time-to-market and improve the customer experience.

Predictive analytics is another area where they want to reinforce their performance and create a more personalized customer view.

Enterprises are looking for data strategies that will derive maximum business outcomes and are moving toward automation that uses small datasets, as big data has become stagnant. In this regard, specialist niche providers are gaining prominence for their ability to set a strong strategy and roadmap in helping these enterprises achieve a competitive advantage, promote new revenue streams and enhance the customer experience. Service providers with industry and domain knowledge, along with highly customized services and solutions are preferred by enterprises in the region.



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



**Innovation leaders** should read this report to understand a provider's capability to deliver seamless solutions by leveraging blockchain, AI and analytics. The report also gives insights into how providers can be compared with one another.



**Chief data officers (CDOs)**, who are responsible for creating value from data assets and data ecosystems, will gain a better perspective on the effective analytics tools and techniques to empower all forms of business outcomes through analytics to derive more value from their enterprise data.

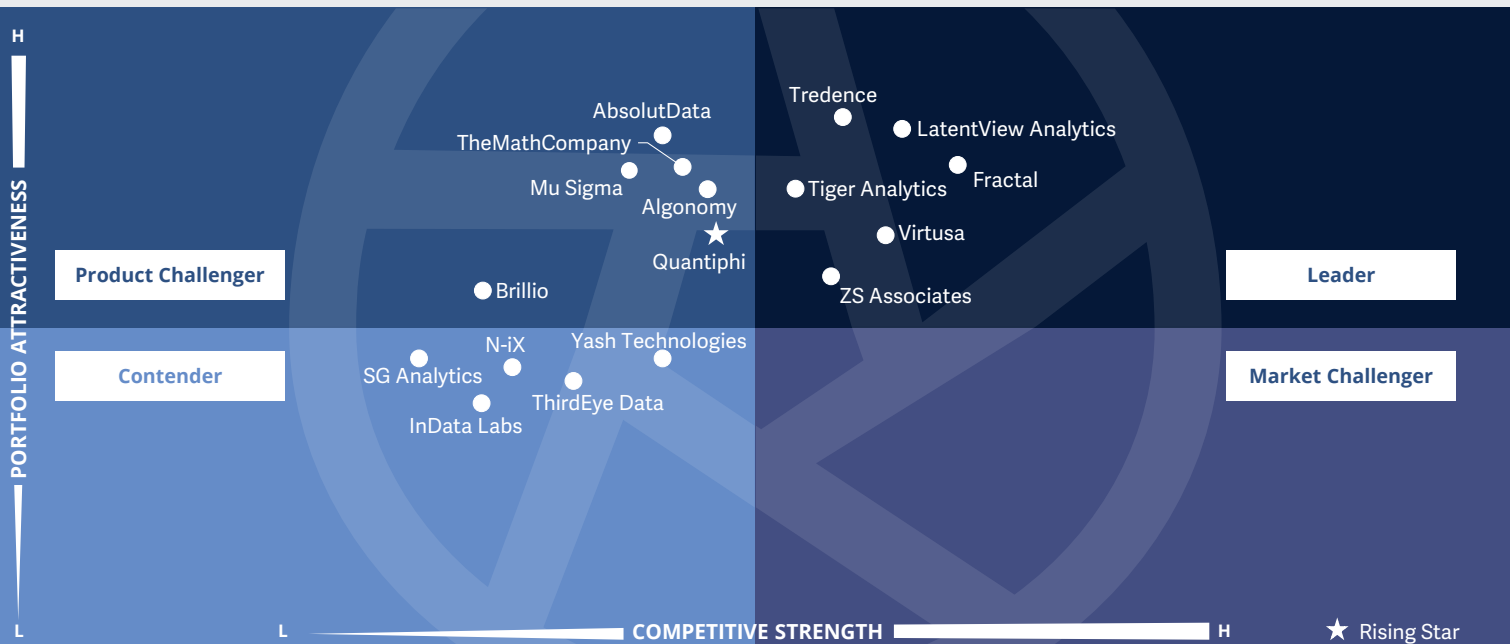


**Chief digital officers (CDOs)**, who are responsible for strategizing and designing a digital-first approach as well as enabling omnichannel availability of services, can refer to this report to gain a better perspective on effective analytics tools and techniques required to enable frictionless transactions and interactions in a virtual environment.



**Analytics Services**  
Data Science Services - Specialist Analytics Providers

U.S. 2022



This quadrant assesses providers with **expertise in scientific techniques and advanced technologies** that offer enterprises with **insights and intelligence to deliver decision support** and transformational value to business processes.

Gowtham Kumar Sampath



## Data Science Services – Specialist Analytics Providers

### Definition

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

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

### Eligibility Criteria

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



### Observations

Specialists are pure-play providers that offer only a data and analytics portfolio with a strong focus on matching their capabilities to these service offerings. Providers such as Virtusa, ZS Associates, Brillio and Yash Technologies have been included in this segment due to their unique and specialized portfolios comprising strong offerings comparable to specialists. These providers do not show much revenue from their embedded analytics services from other portfolios. They rely on experts, domain and industry knowledge, tools and accelerators to drive revenue and growth. Considering the size of these players, a majority are seeking investments in startups for niche capabilities. Data science services continue to witness significant traction with service providers for enterprise intelligence and business outcomes as part of their delivery of services and

solutions. Service providers were investing heavily in acquiring niche capabilities through mergers or developing inhouse solutions. There is a marked increase in the number of readily available solutions that target areas such as customer analytics, marketing analytics, risk analytics, finance analytics, and other areas that drive revenue, customer acquisition and improve customer experience.

Some of the key areas witnessing increased investments from providers and mindshare among enterprises include:

- Explainable AI, trusted AI, responsible AI
- Operationalizing and scaling AI
- Human-machine collaboration
- Context-driven analytics

- Industrialized solutions/approach
- Environmental, social and governance analytics
- Growth in supply chain analytics

From more than 191 companies assessed for this study, 17 have qualified for this quadrant with six being Leaders and one a Rising Star.

### Fractal

**Fractal** is among the largest AI and data science specialists in the advanced analytics market. In January 2022, Fractal received \$360 million in investments from TPG. Its strategy is to build highly customized AI solutions and platforms, with consultancy services generating the bulk of revenue.

### LatentView Analytics

**LatentView Analytics** offers consulting, business analytics and digital solutions leveraging cutting-edge solutions, data insights and predictive modeling for driving business outcomes. It also showcases industry and functional expertise to solve vertical-specific and departmental challenges.



**Tiger Analytics** helps businesses realize their objectives by bringing in cutting-edge methodologies, technologies, processes and solutions to clients. It uses a mix of both partner-led and open-source technologies, offering these solutions free of charge.



## Data Science Services – Specialist Analytics Providers

### TREDECENCE

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**Tredence** leverages a unique “last mile” adoption of data science across enterprises by bridging the gap between insights delivery and value realization. It differentiates through speed to action, value and scale through accelerators, industry and functional expertise, and deep data and AI partnerships.

### Virtusa

**Virtusa** derives its strength from combining aspects of technology and experience from solving problems across verticals. Virtusa takes a multi-disciplinary approach to data analytics to help organizations derive insights. Virtusa also offers consulting services to help enterprises leverage data assets and layout an enterprise analytics roadmap.

### ZS Associates

**ZS Associates** focuses exclusively on the life sciences and healthcare businesses. However, the focus has slowly expanded to other verticals. The company invests significantly in developing ZAIDYN™, which serves as a comprehensive analytics and AI platform with several modules addressing data modernization.

### Quantiphi

**Quantiphi** (Rising Star) applies an AI-first digital engineering approach in which clients have access to an end-to-end application of applied AI and data solutions. It has invested aggressively in cloud partnerships and the development of a broad range of proprietary solutions.





“Tredence has competence in enterprise-grade AI, backed by a differentiated innovation approach.”

*Gowtham Kumar Sampath*

# Tredence

## Overview

Headquartered in San Jose, California, Tredence has around 1,800 employees and operates from over 10 global delivery centres across Foster City, Chicago, London, Toronto and Bangalore. It has more than 75+ global customers across retail, CPG, industrials, healthcare, TMT, financial services, travel and hospitality sectors. Tredence goes to market as a data science solutions provider focused on solving the ‘last mile’ problem in AI, bridging the gap between insight creation and value realisation. In Dec 2022, Tredence was funded \$175 mn by Advent International.

## Strengths

**Offerings to operationalize AI:** Tredence leverages domain-based AI consulting services and solutions to create AI strategies and drive business decisions. The offerings help build enterprise-grade AI systems, combining business analytics, data science solutions and data engineering. The Data Science CoE at Tredence enable companies to build capabilities including model development & algorithms that empowers future use cases.

**Robust partner ecosystem:** Tredence combines its industry expertise with known hyperscalers and data and AI platform partners to drive business

value and faster transformation for clients. Some of its key partners include Microsoft, Databricks, Snowflake, Alation, Bladebridge, GCP, AWS. Tredence works with partners to co-develop industry-specific AI solutions.

### Innovative tools and accelerators:

Tredence offers more than 30 ready-to-deploy AI-powered accelerators. Tredence Studio is a differentiated AI engineering approach that works as an enterprise co-innovation platform to develop new solutions as well as a marketplace for proprietary industry accelerators.

## Caution

Although Tredence offers services across several enterprise functions, its readily available analytics products are specific to data migration, supply chain and customer experience management. The company should invest in expanding its portfolio across other verticals to showcase its ability to industrialize AI solutions.





# Appendix

The ISG Provider Lens™ 2022– Analytics Services 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.

**Lead Author:**

Gowtham Kumar

**Editors:**

Grant Gross and Ambrosia Sabrina

**Research Analysts:**

Maharshi Pandya and Vartika Rai

**Data Analysts:**

Hema Gunapati and Rajesh MC

**Consultant Advisors:**

Stephen Coward, Dries Ballerstedt, Susshruth (Sush) Apshankar, Olga Kupriyanova and Ritwik Dey

**Project Manager:**

Ankur Taneja

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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 December 2022, 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*

**Gowtham Kumar**  
**Senior Manager and Principal Analyst**

Gowtham Sampath is a Senior Manager 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 also works with

advisors in addressing enterprise clients' requests for ad-hoc research requirements within the IT services sector, across industries. He is also authoring 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.



*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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