

Advanced Analytics and AI Services

A research report comparing provider strengths, challenges and competitive differentiators to assist decision-makers in advanced analytics and AI services



Introduction	3	Contacts for this Study	13
About the Study		Advisor Involvement	
Quadrants Research	5	Advisor Involvement - Program	
Definition	6	Description	14
Quadrants by Regions	9	Advisory Team	14
Schedule	10		
Client Feedback Nominations	11	Invited Companies	15
Methodology & Team	12	About our Company & Research	19

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

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

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

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

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



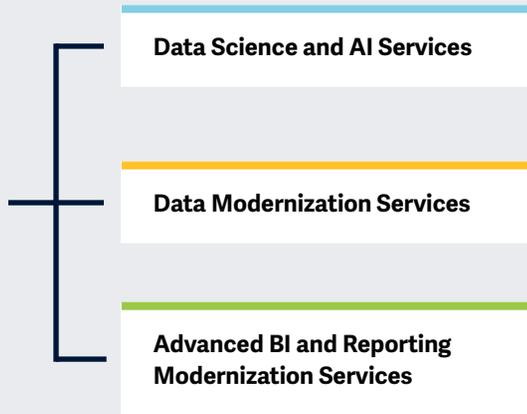
Advanced Analytics and AI Services 2024 - Deep View

Quadrants	Service Segments						Cornerstones		
Data Science and AI Services	Strategy and Roadmap (Assess – Guidance – Maturity)		AI and ML Model (Develop – Evaluate – Deploy)		Productization and Management (Accelerate – Operationalize – Democratize)		Tools, Accelerators, Middleware Industry and Domain Expertise Experience and Engagement Governance and Ethics Co-Innovation and Collaboration Change Management		
	Business Advisory	Data Discovery and Data Mining	AI/ML Modeling	MLOps and Scaling AI	AI/ML Platforms, DSaaS, Digital Twins	Data Sharing/ Democratization			
	Technology Stack	KPIs and Metrics	Model Training, EDA	GenAI, RAI, Trusted AI	CoEs	Workshops and Training			
Data Modernization Services	Implementation and Integration (Design – Build – Integrate)			Migration and Modernization (Run – Optimize – Scale)		Data Management and Governance (Policy – Regulation – Execution)			
	ETL/ELT	Pipeline Automation	API, Connectors	Hyperscaler (AWS, AZURE, GCP)	Data Clouds (Snowflake, Databricks)	Data Lineage, Catalog		Security and Compliance	Data Ecosystems
	Data Hub, Data Stores	Data Fabric and Mesh	EDW, Data Lakehouse	DataOps	Data Quality Observability	Graph MDM		Data Stewards	
Advanced BI and Reporting Modernization Services	Data Preparation and Transformation (Design – Build – Transform)			Design and Development (Integrate – Customize – Scale)		Deployment and Integration (Capability – Functionality – Accelerate)			
	BI Tools (Tableau, Power BI)	Business Storytelling	Data Source Integration, ETL, OLAP	Rationalize, Customization	Report Scheduling and Automation	Self-service, Training			
	Reporting, Visualization Design	Data Quality	Data storage and security	Streaming/Real-time Data	Data Marketplaces	NLP, NLG, NLQ			



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

Simplified Illustration Source: ISG 2024



Scope of the report

The ISG Provider Lens™ Advanced Analytics and AI Services 2024 study offers the following to business and IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness
- Focus on different markets, including Brazil, Europe and U.S.

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their current vendor relationships and potential engagements.



Data Science and AI Services

Definition

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

Service providers evaluated in this study need to address enterprise requirements, including consulting, identifying business use cases, and developing statistical models and algorithms.

Providers should exhibit end-to-end capabilities in architecting, implementing, deploying and scaling enterprise-wide AI projects. They should also offer support and training services as standalone offerings, distinct from other service contracts.

Eligibility Criteria

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



Data Modernization Services

Definition

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

Providers evaluated in this quadrant should offer comprehensive consulting services, including assessment, strategy formulation and the creation of modernization roadmaps. These services encompass designing scalable data architectures, analyzing data landscapes, developing business cases and managing data lifecycles. Providers should offer data migration services, including the transfer of data to cloud platforms and executing data transformations such as cleansing and ETL operations.

They should possess expertise in building data pipelines, integrating diverse datasets, and establishing modern data lakes and warehouses for centralized data storage. Providers should also help streamline change management and improve data delivery through DataOps.

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

Eligibility Criteria

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



Advanced BI and Reporting Modernization Services

Definition

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

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

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

Eligibility Criteria

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



Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we are introducing the following three quadrants on Advanced Analytics and AI Services 2024:

Quadrant	Brazil	Europe	U.S.
Data Science and AI Services	✓	✓	✓
Data Modernization Services	✓	✓	✓
Advanced BI and Reporting Modernization Services	✓	✓	✓



The research phase falls in the period between July and August 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in January 2025.

Milestones	Beginning	End
Survey Launch	July 04, 2024	
Survey Phase	July 04, 2024	August 16, 2024
Sneak Previews	November 2024	December 2024
Press Release & Publication	January 2025	

Collecting client testimonials via the Star of Excellence™ Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the [link](#) to view/download the ISG Provider Lens™ 2024 research agenda.

Access to Online Portal

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

Research Production Disclaimer:

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



ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of “Voice of the Customer.”

The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers’ success in demonstrating the highest standards of client service excellence and customer centricity.

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

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

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

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

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:

ISG.star@isg-one.com



ISG Star of Excellence



The ISG Provider Lens 2024 – Advanced Analytics and AI Services research study analyzes the relevant software vendors/service providers in the global 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 July 2024, 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.



Contacts For This Study

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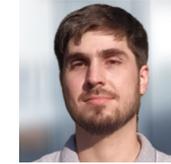
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ISG Provider Lens Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

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

ISG Advisors to this study



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Principal Consultant



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Ryan
Hamze

Principal Consultant



Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

2RP Net*	Aquare.la	Brillio*	Dataside
4Strategies	Arbit	BRLink*	Deal Technologies
66 Degrees	Artefact	BRQ*	Dedalus*
A3 Data	aspire systems	Cadastra	Delaware
Accenture*	Assesso	Capgemini*	Deloitte*
Act Digital	Atos*	CGI*	Dígitro
Addepto	Avanade	CI&T*	doubleSlash*
adesso SE*	avenga	Cigniti*	DRZ
Alexander Thamm*	b.telligent*	ciklum	DTI Digital
All for One	BCG Gamma	CIS Corporate	DXC Technology*
Altimetrik	BHS*	Cognizant*	Elastacloud
Amazon Informatica	BIP	Compass UOL*	Eleflow
Analytics8*	Birlasoft*	data forest	Encora*
Apexon*	BJSS*	dataRain*	EPAM Systems*
Aptus Data Labs	BlueShift*	Datarisk	Evaluate Serve



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* Rated in previous iteration

Eviden	HARMAN Digital Transformation Solutions*	Infosys*	L3
Exadel	HartB	Inmetrics*	LatentView Analytics*
Exata.it	HCLTech*	Innova solutions	Leega*
EXL*	Hexaware*	Innovor Digital	Levva
EY*	Hitachi Digital Services*	IT Lean	Lingaro
Factspan*	HTC Global Services*	IT.Eam	Logicalis*
FCamara	HVAR	ITC Infotech*	LTIMindtree*
First Decision	IBM*	Iteris*	Luby
Foursys	Icaro Tech	itmagination	MadeinWeb*
Fractal*	Impetus Technologies*	it-novum*	Marlabs*
GAVB*	InData Labs*	Keeggo	Marmeladenbaum GmbH*
Genpact*	Indicium	Keyrus*	Mastek
GFT*	Indium Software*	KPMG*	MathCo*
Globant	Infocepts	Kumulus*	MD2 Consultoria
Grazitti Interactive*	Infogain*	Kyndryl*	MG Info



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* Rated in previous iteration

Mphasis*	pmOne*	Sigmoid*	Tech6
Mu Sigma*	Programmers Beyond IT	SLK Group*	TechMobius
Nava	Protiviti	Softek	TEG Analytics
Navikenz	PwC*	Softweb solutions	ThirdEye Data*
Neoris	Qintess*	Sonda	Tiger Analytics*
Neurotech	Quantiphi*	Sopra Steria*	TIVIT*
Niteo	Rackspace Technology*	ST IT Cloud*	Topmind
N-iX*	Red Innovations	STATWORX*	Tredence*
NTT DATA*	Reply*	Stefanini*	Trianz*
Online Applications	Rox Partner*	Straive	triggo.ai
Oper Data	Santo Digital	synechron	T-Systems
OPITZ CONSULTING*	ScienceSoft	SysMap	UCloud
Orange Business*	SDG Group	Taking	UniSoma*
Peers*	Sedin Technologies/Datakulture	TCS*	Unisys
Persistent Systems*	SG Analytics*	Tech Mahindra*	UST*



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* Rated in previous iteration

V8. Tech

valcon

Venturus

Virtusa*

Visionet*

Wavestone*

Wipro*

WNS*

Xebia

Xoriant

Yssy*

Zensar Technologies*

Zoox

ZS*



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](#).

iSG Research™

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For more information about ISG Research™ subscriptions, please email contact@isg-one.com, call +1.203.454.3900, or visit research.isg-one.com.

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.





JULY, 2024

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