

Everest Group PEAK Matrix[®] for Data & Analytics Service Providers 2020

Focus on Accenture

October 2020



Background and scope of the research

The ecosystem of D&A players has succeeded in educating the market on the supremacy of evidence-based decision-making over traditional gut-based and thumb rule-based approaches. Consequently, the debate today has upgraded to ROI of D&A investments and scalability of initiatives. While enterprises have seen D&A investments translate into improved business outcomes and customer and employee experience, organizations are still failing to achieve the full benefit owing to the adoption of D&A programs in pockets, lack of data skills across the enterprise, and inefficient/unoptimized data management practices. In this regard, service providers can help enterprises formulate a central vision for D&A, streamline investments, modernize the data landscape, and upskill enterprise users to achieve multiple outcomes through coherent and enterprise-wide data-driven decision-making.

In this context, we present an assessment and detailed profiles of 28 service providers featured on the D&A services PEAK Matrix® 2020. Each service provider profile provides a comprehensive picture of its services focus through a snapshot of its relative capabilities across assessment parameters, key strengths, and areas of improvement, as assessed by Everest Group. The assessment is based on Everest Group's annual RFI process for the calendar year 2019, interactions with leading D&A service providers, client reference checks, and ongoing analysis of the D&A services market (refer to slide 8 for key sources of information).

This report includes the profiles of the following 28 leading D&A service providers featured on the D&A PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Cognizant, Deloitte, IBM, TCS, and Wipro
- **Major Contenders:** Atos, Birlasoft, Coforge, DXC Technology, EY, HCL, Infosys, KPMG, LTI, Mphasis, NTT DATA, PwC, Stefanini, Tech Mahindra, and Virtusa
- **Aspirants:** Datamatics, Happiest Minds, Sonata Software, UST Global, and Zensar

Scope of this report:



Geography
Global



Service providers
28 leading D&A service providers



Services
D&A services

D&A services PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, Cognizant, Deloitte, IBM, TCS, and Wipro

- Leaders have displayed a vision focused on driving business outcomes through D&A services for their customers
- They made sustained strategic investments to bridge the portfolio gaps to achieve full services play
- They are at the forefront of innovation and driving change with thought leadership, partnerships, and internal investments in emerging themes such as AI-scaling, intelligent data management, data landscape modernization, democratization, and data literacy
- Leaders have invested heavily in building structured internal talent development programs to ensure the availability of skilled talent to solve complex problems. They also focus on the breadth of skills, enabling full services play by developing a range of certification programs that help them stay ahead as technology evolves
- Leaders have developed a range of integrated platforms along with industry- and use case-specific accelerators to cut down the trial and run phase to achieve faster outcomes
- Domain focus and willingness to share risk and returns through value-based pricing models have further differentiated them in stakeholder partnerships

Major Contenders:

Atos, Birlasoft, Coforge, DXC Technology, EY, HCL, Infosys, KPMG, LTI, Mphasis, NTT DATA, PwC, Stefanini, Tech Mahindra, and Virtusa

- Major Contenders have shown high confidence in their sweet spots within the D&A stack. They have a strong base of satisfied clientele within these areas
- Major Contenders have the vision to develop full services play and are investing in talent development programs, acquisitions, IP building, and a partnership ecosystem to enable the same
- They need to supplement their vision and investments with effective communication of success on transformative end-to-end D&A deals to enhance their market perception

Aspirants:

Datamatics, DMI, Happiest Minds, Sonata Software, UST Global, and Zensar

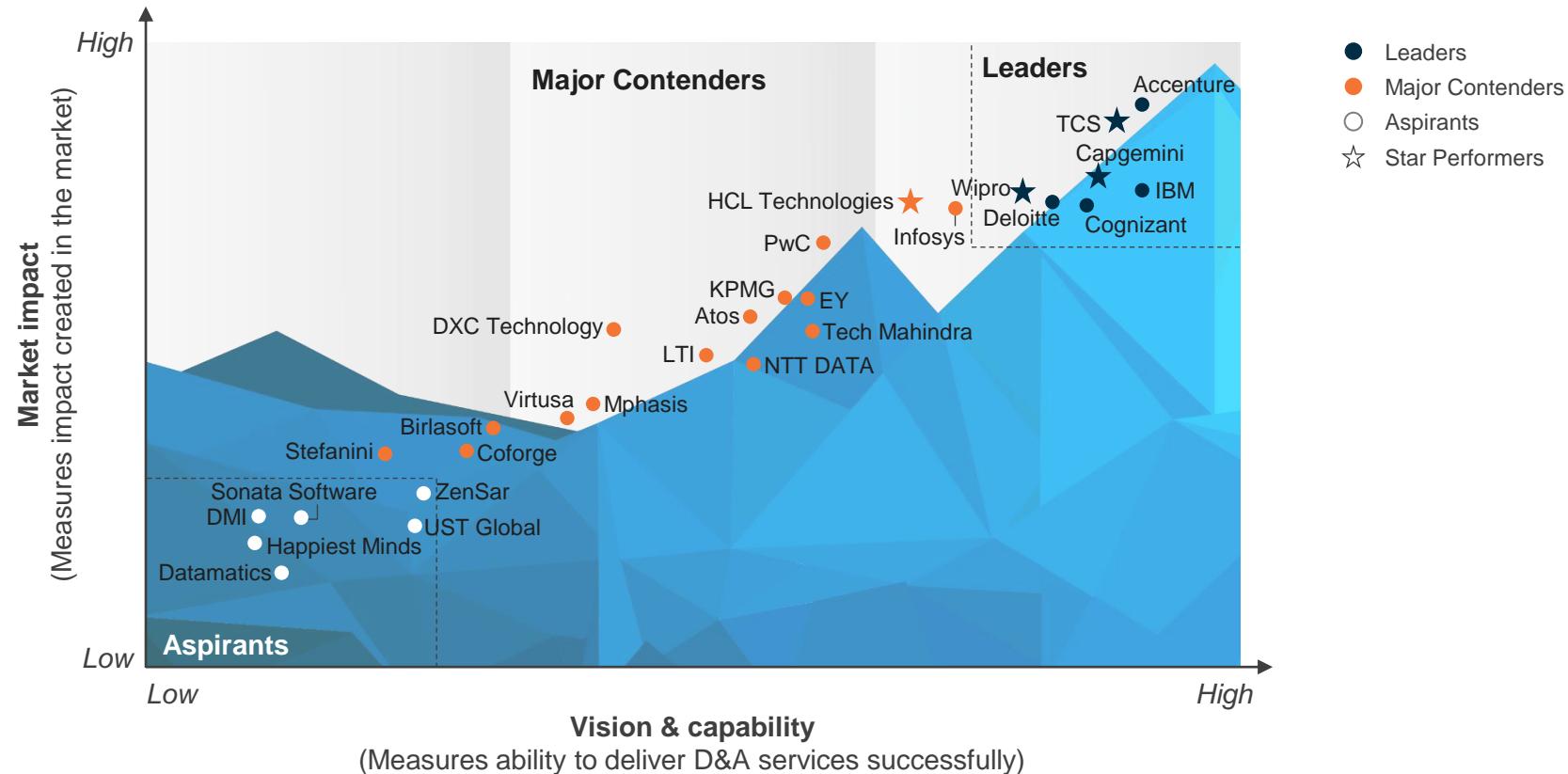
- They aim to focus on creating solutions beyond niche areas; most engagements are based on flagship tools and solutions. The majority of investments are also directed toward upgrading and improving the features of these flagship solutions

Everest Group PEAK Matrix®

Data and Analytics (D&A) Services PEAK Matrix® Assessment 2020 | Accenture features as Leader



Everest Group Data and Analytics (D&A) Services PEAK Matrix® Assessment 2020



Note 1 PEAK Matrix specific to Data & Analytics services

Note 2 Assessment for Atos, Deloitte, DXC Technology, EY, Infosys, KPMG, NTT DATA, and PwC excludes service provider inputs on this particular study, and is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of service providers' public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete

Accenture | D&A services profile (page 1 of 5)

Overview

Company overview

Accenture Plc (Accenture) is a global professional services company offering a wide gamut of services and solutions in strategy, consulting, digital, technology, and operations. It assists clients in business transformation through advanced analytics and design methodologies, supply chain, talent and organization, marketing, automation, cloud and infrastructure, and other solutions. The company's clientele includes governments, medium-sized companies, Fortune Global 500 companies, government agencies, and other enterprises. It has presence across the world, especially focusing on the US, Europe, and Asia Pacific.

Key leaders: Julie Sweet (CEO); Penelope Prett (CIO); Paul Daugherty (CTIO); Sanjeev Vohra (Global Lead, Accenture Applied Intelligence Network); Shail Jain (Global MD, Data & AI)

Headquarters: Dublin, Ireland

Website: www.accenture.com/

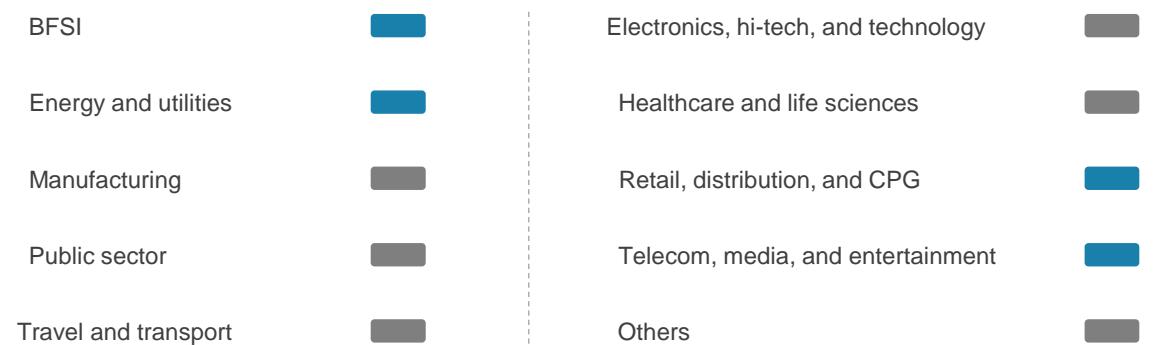
D&A practice fact sheet (Everest Group estimates)

	2018	2019
D&A Revenue (US\$ million)	5,000-5,500	6,000+
D&A FTEs	NA	~40,000

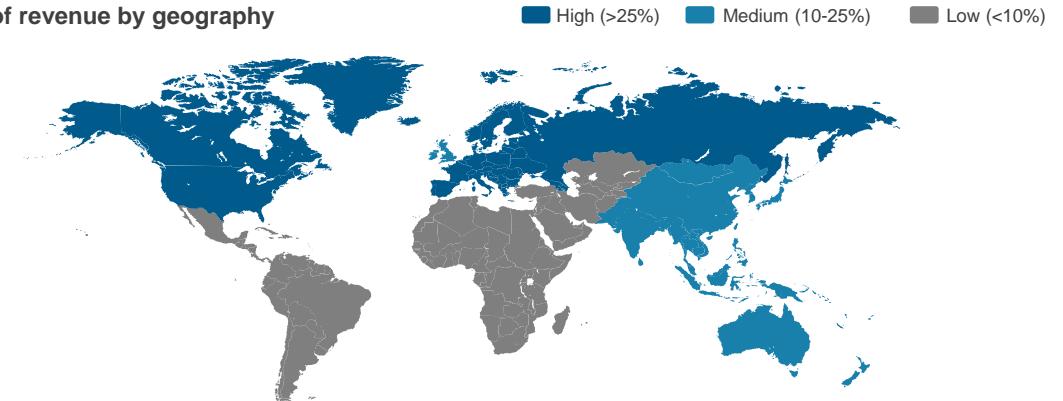
D&A practice overview

- Accenture's D&A solutions, including strategy and consulting, enterprise data management, data governance, BI & visualization, advanced analytics, and next-generation services, are part of its Applied Intelligence Network & Programs (AAI N&P). It is a formal practice of professionals with expertise in automation, analytics, and AI (3As), with accentuated data capabilities across the company
- Its key focus areas are innovation through its innovation hubs, liquid studios, and strategic collaborations with leading universities across the globe. Its 30 delivery centers focus on delivering and scaling innovative AI solutions and an additional seven centers of excellence focus on leading application of data
- Buyer size:** Most of its deals are signed with large market clients with an annual revenue of >US\$5 billion

Percentage of revenue by industry



Percentage of revenue by geography



Accenture | D&A services profile (page 2 of 5)

Key delivery locations



Note: Accenture has 101+ service delivery locations present around the globe

Accenture | D&A services profile (page 3 of 5)

Solutions

D&A IP overview

- Accenture's IP/technology portfolio is centered around strategy, functional, and industry acumen. It is driven by assets and IP that includes proprietary, created, acquired, developed, or leveraged through partnerships with other technology companies and underpinned by data insights and design to provide continuous innovation to its clients
- Company holds IP in areas such as Artificial Intelligence (AI), cybersecurity, blockchain, quantum, and extended reality. The company holds approximately 7,400 patents and pending patent applications in 44 countries. The company's applied intelligence (D&A) portfolio of patents include more than 675 patents issued and 800+ patents pending
- Accenture R&D serves as the foundation for the formation and on-going evolution of AIP+. Accenture Labs provide IP around big data architectures, automation of AI and analytics frameworks, and model management forming the foundation of AIP+'s 110+ patents and pending patents

Proprietary IP/solutions/frameworks/accelerators/tools developed internally to deliver D&A services

Solution name	Solution type	Year launched	Details (include value prop)
AIP+	Framework / Accelerator	2015	A collection of Accenture software assets, coupled with a scalable managed service architecture that enables Accenture to accelerate delivery of customized digital outcomes for its clients
myNav	Platform	2019	A cloud platform that helps organizations design and simulate different cloud solutions to identify the ones that best fit their specific business requirements. It enables organizations to maximize the return on their current and future cloud technology investments
myWizard	Platform	2016	An intelligent software-engineering platform that helps organizations make advanced analytics and AI-driven software engineering techniques a conventional practice by standardizing the engineering of AI solutions

Key partnerships

ERP



Data integration, preparation, and governance



Cloud and Big Data



BI and visualization



Others



Accenture | D&A services profile (page 4 of 5)

Investments and market success

Other investments to enhance D&A services capabilities, e.g., setting up of new delivery centers / CoEs / innovation labs, trainings/certifications, etc.

Development	Details
Talent	<ul style="list-style-type: none"> Invested more than US\$925 million in 2019 on employee training and development to support and nurture talent in analytics and other advanced technologies Invested in focused learning programs on data-driven consulting to help employees build analytics skills through its partnership with Northwestern virtual program Trained 100,000+ Accenture people in design thinking and 75,000+ in agile. Also, provided employees training around consulting and TQ programs, function, industry, platform-specific training, and data-driven analytics and industry X.0
Innovation network	Scaled its support infrastructure by adding 10+ innovation hubs focused on automation, analytics, and AI in North America, Europe, and Asia to help clients create innovative solutions that deliver tangible value
Acquisitions	Acquired several D&A organizations, such as Mudano, Clarity Insights, Pragis Bidoop, Analytics8, and Knowledgent, since the beginning of 2019 in order to strengthen its capabilities, workforce, and suite of available solutions
Alliance ecosystem	Works with multiple technological partners, such as Microsoft, Google, AWS, IBM, Alibaba, SAP, Oracle, and Salesforce.com, to co-develop industry solutions or use cases on their platforms and provide these as accelerators to its client. Partnered with academic institutions to help skill their current employees
R&D	Invested in R&D activities to develop AI-based solutions and services for clients and scale their capabilities in data engineering and cloud platforms for data

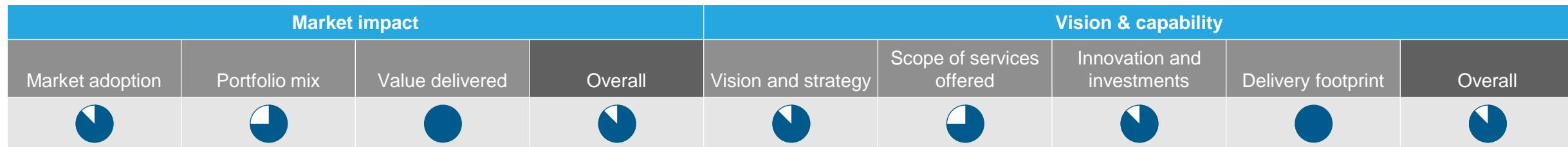
Recently-announced D&A engagements (non-exhaustive)

Client	Year of signing	Geography	Engagement details
A global mining contractor	Not disclosed	Not disclosed	Leveraged Accenture's analytics and IoT capabilities to increase mine-site efficiency, cut costs, and improve operations. Built an inventory management system supported by predictive analytics to monitor fuel and parts inventory levels for future maintenance and operations and developed a dashboard that provides maintenance schedule recommendations based on truck health, part readiness, and manpower availability and improved component life by 10%
An American global consumer goods manufacturer	2019	US	Improve client's cyber resilience by using actionable intelligence and advanced analytics to detect advanced internal and external threats. It leveraged Splunk to enhance business insights and revenue growth opportunities with analytics solutions and identify trends and improvement opportunities from enterprise data
Telecom company	Not disclosed	UK	In a multi-phased, predictive customer service program, Accenture helped the client use AI and ML technology to steer customers to digital channels and improve customer experience and reduce costs. It increased the digital channel usage by 26% and reduced the number of inbound calls by 1.5 million

Accenture | D&A services profile (page 5 of 5)

Everest Group assessment – Leader

Measure of capability:  High  Low



Strengths

- Accenture is one of the largest D&A service providers with strong presence in North America and Europe. It provides comprehensive D&A and AI services offerings under its Applied Intelligence arm
- Its proprietary D&A solutions focus on bringing together end-to-end in-house capabilities along with vertical-specific nuances. For example, Applied Intelligence Platform with multiple preconfigured solutions across verticals drives data-centric business transformations
- Accenture's aggressive acquisition strategy, with multiple recent acquisitions such as Mudano, Clarity Insights, and Sentelis, have enabled it to expand capabilities across geographies, industries, and next-generation technologies
- Referenced clients value the quality of services, complemented by agile implementation of solutions at scale
- Clients appreciate Accenture's strong talent pool with skilled resources across the traditional as well as next-generation technology spectrum
- Client successes and adoption of design thinking principles while building MVP for D&A, lend Accenture a market educator perception among its clients

Areas of improvement

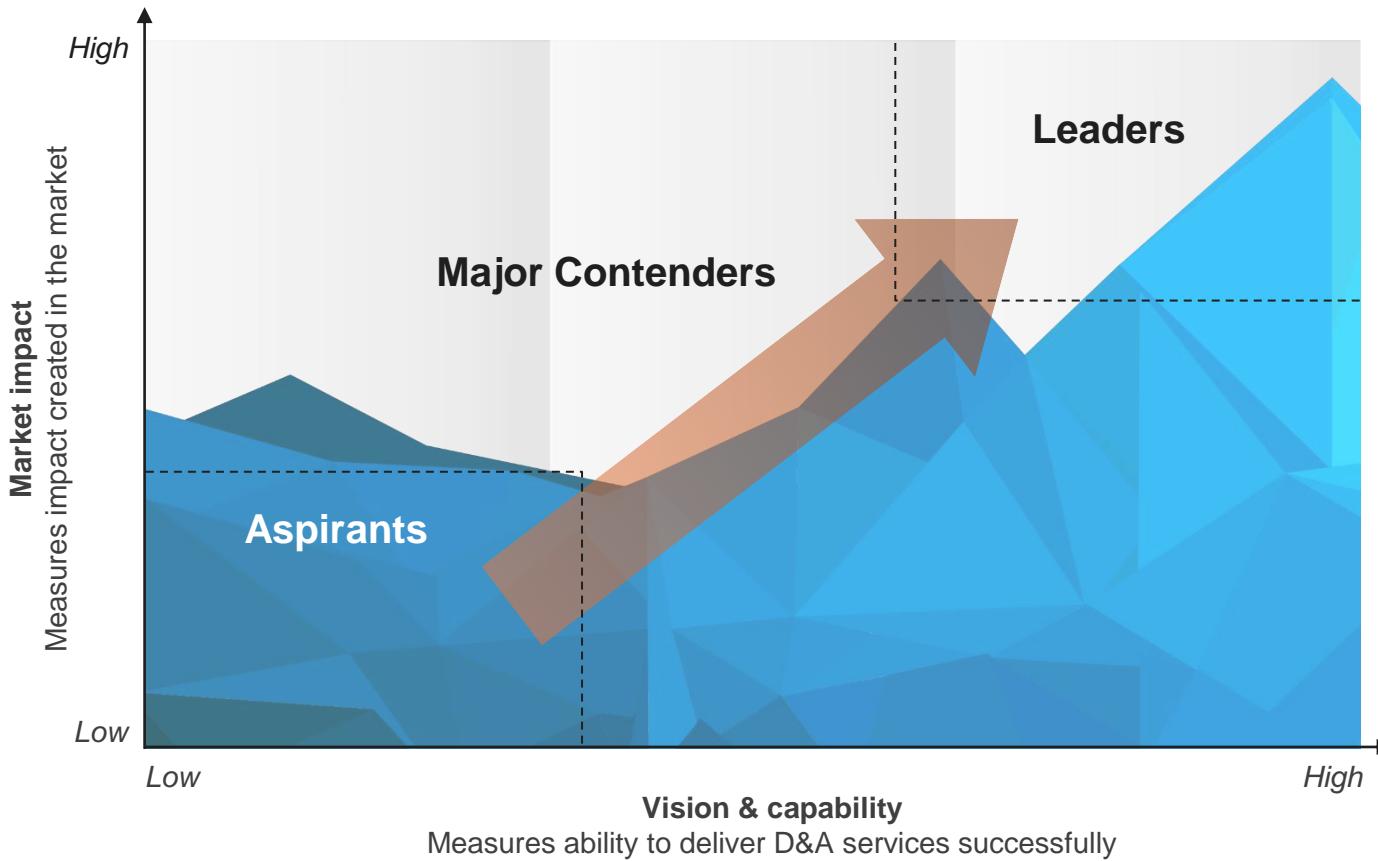
- Accenture has a premium-priced perception that pushes it down the pecking order for clients looking for typical “run” services, with cost savings being the primary objective
- Clients perceive it to lack contracting flexibility owing to its push to embed its in-house IP and platforms in all engagements
- A major proportion of its D&A revenue comes from large-market buyers. Accenture's value proposition for small and mid sized enterprises, looking for modular/tailored services, is unclear
- Some clients highlighted that there is scope for improvement in collaboration across Accenture Strategy, Accenture Consulting, Accenture Digital, Accenture Technology, and Accenture Operations, to avoid unanticipated delays in deliverables across engagements

Appendix

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision & capability



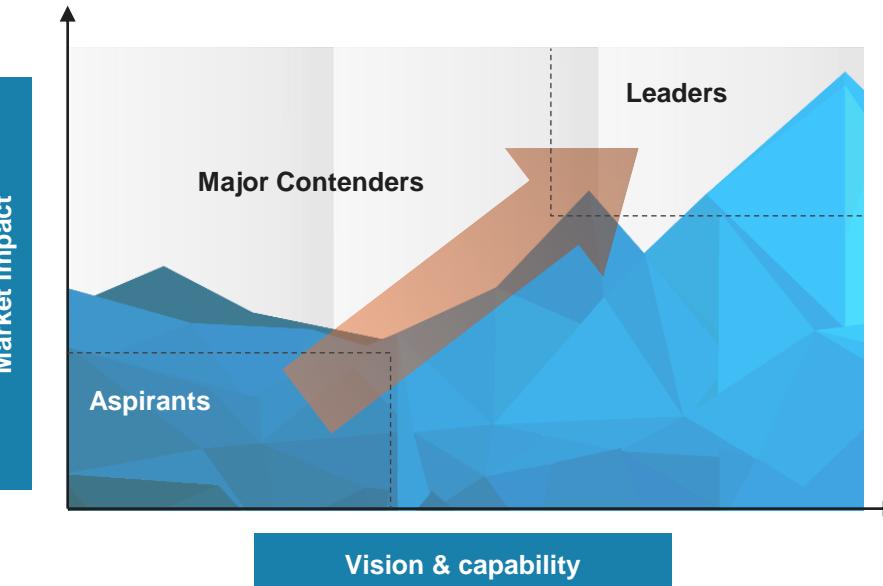
Everest Group PEAK Matrix



Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume
Portfolio mix
Diversity of client/revenue base across geographies and type of engagements
Value delivered
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully.
This is captured through four subdimensions

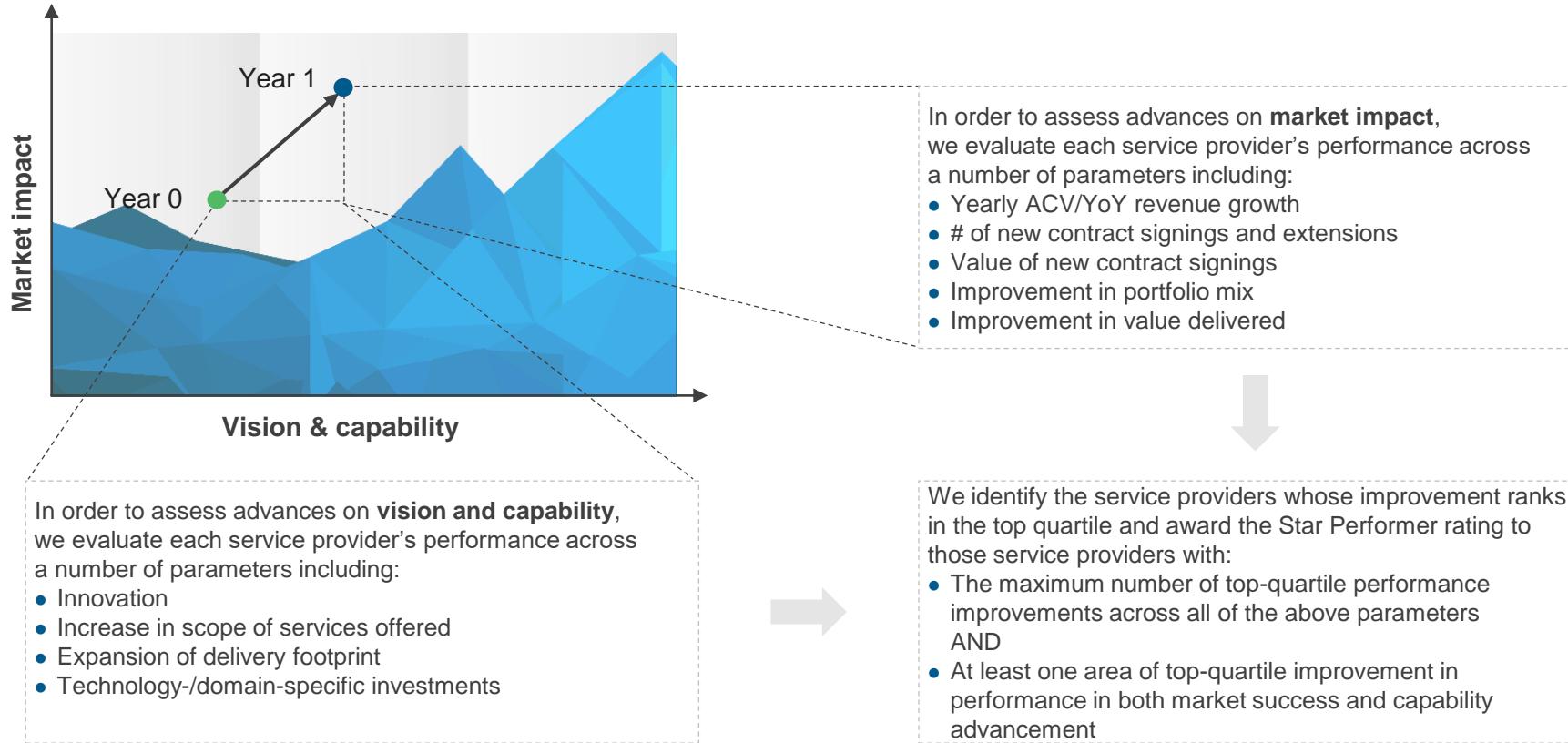
Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint
Vision for the client and itself; future roadmap and strategy	Depth and breadth of services portfolio across service subsegments/processes	Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, and M&A	Delivery footprint and global sourcing mix

Everest Group confers the Star Performers title on providers that demonstrate the most improvement over time on the PEAK Matrix®



Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



The Star Performers title relates to YoY performance for a given vendor and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated/fine-tuned based on our market experience, buyer interaction, and provider/vendor briefings

Is being a “Major Contender” or “Aspirant” on the PEAK Matrix, an unfavorable outcome?

No. The PEAK Matrix highlights and positions only the best-in-class service providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition

What other aspects of PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader,” “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

What are the incentives for buyers and providers to participate in / provide input to PEAK Matrix research?

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the marketplace, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a service provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)
- The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with the designated POC at Everest Group

Does the PEAK Matrix evaluation criteria change over a period of time?

PEAK Matrix assessments are designed to serve the present and future needs of enterprises. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality as well as serve the future expectations of enterprises



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