

The Forrester Wave™: Specialized Insights Service Providers, Q2 2020

The 13 Providers That Matter Most And How They Stack Up

by Jennifer Belissent, PhD

June 8, 2020

Why Read This Report

In our 18-criterion evaluation of insights service providers, we identified the 13 most significant ones — Alibaba Cloud, BearingPoint, EPAM, Fractal Analytics, HCL, LTI, NEC, SAP, Telefónica, Teradata, Tiger Analytics, West Monroe, and ZS — and researched, analyzed, and scored them. This report shows how each provider measures up and helps customer insights (CI) professionals select the right one for their needs.

Key Takeaways

HCL, Tiger Analytics, SAP, EPAM, And Fractal Analytics Lead The Pack

Forrester's research uncovered a market in which HCL, Tiger Analytics, SAP, EPAM, and Fractal Analytics are Leaders; ZS, Alibaba Cloud, Telefónica, and West Monroe are Strong Performers; and Teradata, BearingPoint, LTI, and NEC are Contenders.

Unique Data, Decision Support Tools, And Capacity Building Are Key Differentiators

As analytics tools become readily available, it's their application to specific use cases, the implementation of insights, and the delivery of concrete business outcomes that make vendors stand out in the crowd. Vendors that can provide differentiating data, insights automation and decision support, and capacity building position themselves to deliver timely, relevant, and actionable insights to their customers.

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The 13 Providers That Matter Most And How They Stack Up



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Related Research Documents

- [The Forrester Wave™: Enterprise Insights Service Providers, Q2 2020](#)
- [Now Tech: Insights Service Providers, Q1 2020](#)



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Top Insights Service Providers Deliver Business Outcomes

The need for customer obsession is even more acute in uncertain times. Successful leaders know they must adapt to survive and thrive. They build adaptive enterprises that flex and pivot in response to rapidly changing customer, competitive, and technology trends.¹ They must anticipate changes and react quickly. How? By being insights driven. But that's easier said than done. While 90% of global data and analytics decision makers prioritize improving the use of data insights in business determinations, 91% consider this to be at least moderately challenging.² Fortunately, there's help. Over half of these decision makers are engaging external services or strategic business consultants for data and analytics — in other words, an insights service provider.³

Insights Service Providers Fall Into Two Broad Categories: Enterprise And Specialized

The insights service provider landscape is as vast and diverse as the business problems companies face — and it's growing. In Forrester's "Now Tech: Insights Service Providers, Q1 2020," we identified four segments: business services and consultancies; technology service providers; pure-play insights providers; and technology or telecom providers.⁴ For this evaluation, we combined the segments into two broad categories: enterprise and specialized insights service providers.

Enterprise insights service providers have a heritage in either business and management consulting or technology services and systems integration.⁵ Specialized insights service providers extend existing offerings — technology, telecom, or staff augmentation services — to deliver insights services.⁶ For our evaluation of enterprise insights service providers, read "[The Forrester Wave™: Enterprise Insights Service Providers, Q2 2020.](#)"

Specialized Insights Service Providers Deliver Distinctive Insights Engagements

Specialized insights service providers deliver insights with unique value propositions. Technology and telecom vendors leverage their unique assets to offer insights services as an add-on to existing products or services. Many pure-play insights providers have evolved from staff augmentation models with new tools and technologies to complement experienced and skilled workforces. Firms should consider these providers if they have an existing technology, infrastructure, or staff augmentation relationship or find a specific offering that meets their needs. These providers come from diverse backgrounds but often rival the larger or more established service firms.

Insights service customers engage external help to accelerate their projects.⁷ But these engagements bring more than just additional hands. When asked about the benefits of engaging external help, insights leaders report that their decision makers are looking for partners to help them create differentiation and competitive advantage and build the competencies to deliver at scale. Successful engagements deliver business outcomes. To ensure business benefits, insights service customers should look for providers that:

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- › **Provide differentiating data to unlock unique insights.** Differentiation lies in the ability to stand out in the crowd. That requires unique insights into customers and business context. To find that nugget, 56% of global data and analytics decision makers are expanding their use of external data.⁸ Many businesses reach out to insights service providers for help: 37% of global services decision makers using them report that taking advantage of the third party's content or data sets is a primary benefit of engaging an insights service provider.⁹ Many service providers deliver differentiated data offerings. Telefónica offers its own aggregated network data, an asset providing unique insights. Tiger Analytics digs into online content to extract alternative data.
- › **Deliver insights through both automation and decision support.** Recognizing that insights alone won't move the needle, insights service engagement must ensure that decision makers apply insights or embed them in automated processes. Service providers offer a range of options, from basic dashboards to AI-powered chatbots. Interactive decision support tools ensure that decision makers can evaluate alternative actions. In some cases, full-scale digital twins enable extensive scenario planning. Mining operators test alternative process changes; air traffic controllers evaluate route optimizations.
- › **Support not only change management but capacity building as well.** Successful engagements require project-level change management to communicate the business case and evangelize the need for change; training on new tools and processes ensures adoption. However, for longer-term sustainability, leaders must build capacity to embed these changes into the organization's operating model. Capacity building implies embracing new organizational structures, such as an insights center of excellence, and developing data literacy. Customers with more successful outcomes report their insights service providers taking an active role. Several service providers offer extensive training programs, such as Telefónica's LUCA Academy or HCL's myAcademy.

Evaluation Summary

The Forrester Wave evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and does not represent the entire vendor landscape. You'll find more information about this market in our reports on insight services.¹⁰

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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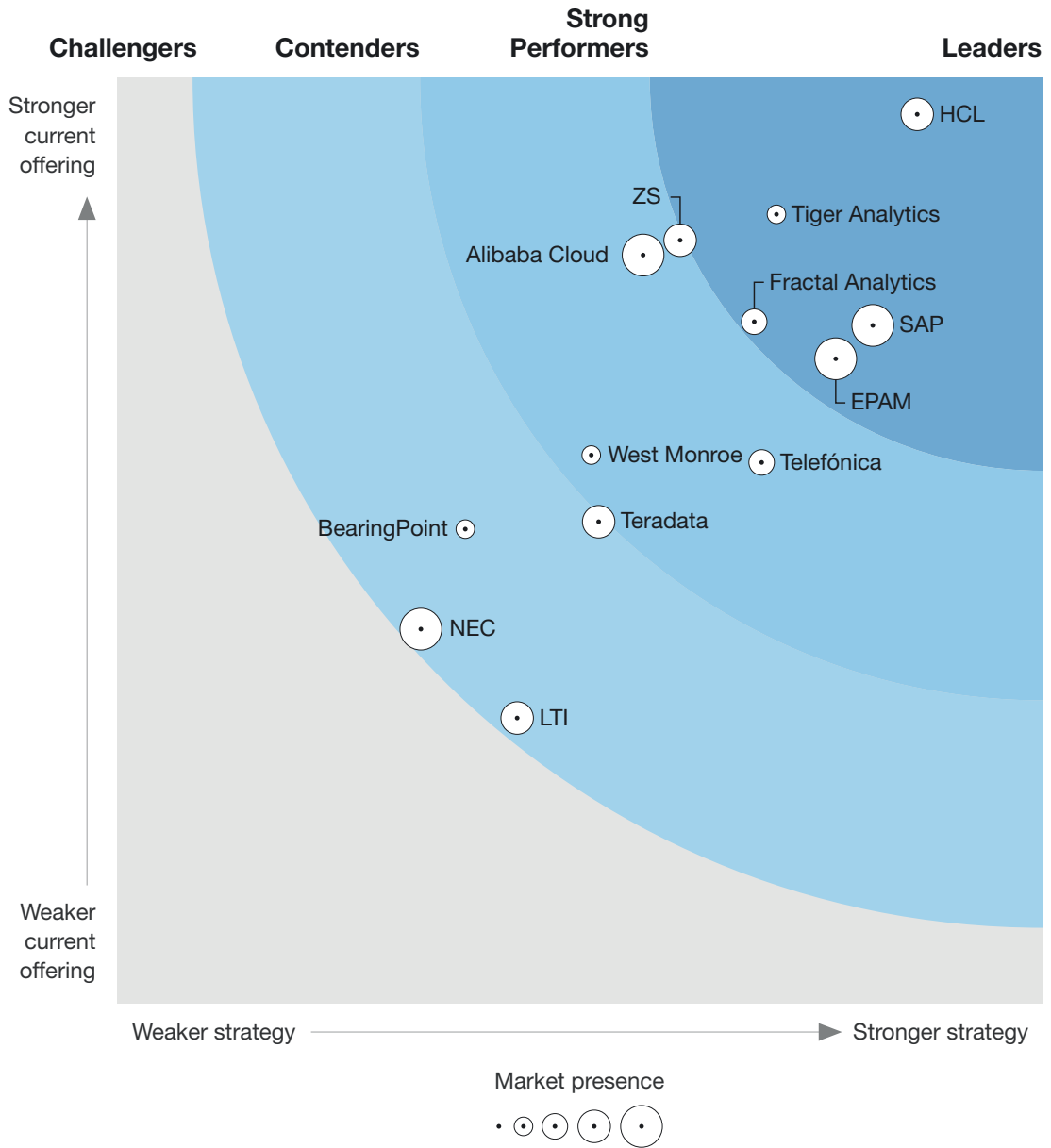
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FIGURE 1 Forrester Wave™: Specialized Insights Service Providers, Q2 2020

THE FORRESTER WAVE™

Specialized Insights Service Providers

Q2 2020



The Forrester Wave™: Specialized Insights Service Providers, Q2 2020

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FIGURE 2 Forrester Wave™: Specialized Insights Service Providers Scorecard, Q2 2020

	Forrester's weighting	Alibaba Cloud	BearingPoint	EPAM	Fractal Analytics	HCL	LTI	NEC
Current offering	50%	4.04	2.56	3.48	3.68	4.80	1.54	2.02
Business and consulting services	20%	4.20	3.40	3.40	4.20	5.00	1.00	2.60
Data services	20%	4.20	2.20	5.00	3.00	4.20	3.00	1.00
Advanced analytics and AI services	25%	5.00	3.00	3.00	3.00	5.00	1.00	3.00
Insights delivery/ implementation support	20%	3.00	1.00	3.00	5.00	5.00	1.00	1.00
Engagement success factors	10%	2.60	3.40	3.00	3.40	4.60	1.40	3.00
Current partner ecosystem	5%	5.00	3.00	3.00	3.00	5.00	3.00	1.00
Strategy	50%	2.84	1.88	3.88	3.44	4.32	2.16	1.64
Services vision	60%	3.00	1.00	3.40	4.00	4.40	2.40	1.00
Ecosystem strategy	40%	2.60	3.20	4.60	2.60	4.20	1.80	2.60
Market presence	0%	5.00	2.00	4.50	2.50	4.00	4.00	4.50
Customer base	50%	5.00	2.00	4.00	3.00	4.00	4.00	4.00
Revenue growth	50%	5.00	2.00	5.00	2.00	4.00	4.00	5.00

All scores are based on a scale of 0 (weak), 1, 3, or 5 (strong).

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FIGURE 2 Forrester Wave™: Specialized Insights Service Providers Scorecard, Q2 2020 (Cont.)

	Forrester's weighting	SAP	Telefónica	Teradata	Tiger Analytics	West Monroe	ZS
Current offering	50%	3.66	2.92	2.60	4.26	2.96	4.12
Business and consulting services	20%	3.00	1.80	2.60	2.60	2.60	3.80
Data services	20%	3.00	3.80	4.20	5.00	2.20	3.80
Advanced analytics and AI services	25%	3.00	3.00	1.00	5.00	3.00	5.00
Insights delivery/ implementation support	20%	5.00	3.00	3.00	5.00	3.00	3.00
Engagement success factors	10%	4.60	3.00	1.40	3.40	5.00	5.00
Current partner ecosystem	5%	5.00	3.00	5.00	3.00	3.00	5.00
Strategy	50%	4.08	3.48	2.60	3.56	2.56	3.04
Services vision	60%	4.00	3.00	2.60	5.00	2.00	4.00
Ecosystem strategy	40%	4.20	4.20	2.60	1.40	3.40	1.60
Market presence	0%	5.00	3.00	4.00	2.00	2.00	3.50
Customer base	50%	5.00	3.00	5.00	2.00	2.00	3.00
Revenue growth	50%	5.00	3.00	3.00	2.00	2.00	4.00

All scores are based on a scale of 0 (weak), 1, 3, or 5 (strong).

Vendor Offerings

Forrester included 13 vendors in this assessment: Alibaba Cloud, BearingPoint, EPAM, Fractal Analytics, HCL, LTI, NEC, SAP, Telefónica, Teradata, Tiger Analytics, West Monroe, and ZS.

Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

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Leaders

- › **HCL balances tech capabilities and business acumen to deliver true insights services.** HCL delivers a broad portfolio of digital transformation services, from building platforms to addressing business use cases. Vertical- and domain-specific assets power diverse engagements. AI is infused in the entire value chain, improving data management and governance, predicting events, and prescribing business actions. Recent acquisitions have expanded its offering: Strong Bridge Envision, a US-based digital transformation consulting firm, brings capabilities in digital strategy, business transformation, and organizational change management. Reflecting HCL's balanced approach, service enhancements include investments in technology solutions, business advisory investments, and partner relationships.

HCL enjoys long relationships with its customer references, with multiple insights service engagements of more than five years. All references gave the vendor top ratings for industry expertise, business advisory services, analytics capabilities, and insights delivery. All attribute specific business outcomes to their engagements, believe that HCL is at the forefront of thought leadership and technology development, and are confident that HCL will remain at the cutting edge of data, analytics, and AI. References endorse HCL as “innovative” and “forward thinking, knowledgeable of industry data-specific assets.”

- › **Tiger Analytics clearly punches above its weight in the insights service arena.** Tiger Analytics illustrates the adage that good things come in small packages. Despite its smaller market presence, Tiger offers the full range of insights services. Data engineering is its fastest-growing service but is delivered as a means to an end. Tiger demonstrated innovative approaches to data sourcing, identifying unique “alt” data sources to enrich models. Tiger reports low attrition and emphasizes culture, the “Tiger Way,” as a core value. Tiger excels at employee experience, offering not only training but also mentoring programs to guide career paths and transfer knowledge.

Customer references give Tiger Analytics top scores for all technical categories as well as for data, analytics, and insights delivery, and they suggest only slight improvements possible in business advisory and implementation. References appreciate Tiger's openness to sharing IP, investment in cocreation, and commitment to a culture of partnership. All references report positive outcomes, are confident that Tiger “can remain on the cutting edge,” and “enthusiastically sing their praises.”

- › **SAP's insights services deliver new innovative capabilities to product-related rollouts.** SAP delivers insights services mainly to support its product portfolio and help customers get the maximum value out of their investment. Its Analytics and Insights consulting practice is part of the delivery organization, with consultants closely aligned with SAP's Innovation Services and Solutions. These teams additionally offer custom development for SAP products. For example, when implementing ERP, an insights engagement would improve the procurement process delivering insights that predict events and prescribe specific actions.¹¹ With this product-specific orientation, the SAP offering stands out from the pure-play insights providers.

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SAP's customer references confirm the product-specific nature of the service engagements. Consultants help get the products up and running, but the engagement will become more support-oriented once implementation is complete. That is not to say these engagements are purely technical. With one manufacturing reference, SAP teams are helping build advanced analytic models to detect feature clusters and outliers to help the customer build its own product configurations. Engagements include change management to evangelize the new capabilities, and references appreciate SAP as an unbiased expert leading the sessions. Yet, understandably, capacity building seems more technology focused. All in all, customers references recommend SAP.

- › **Strong product engineering underpins EPAM's insights services strategy.** EPAM's strength lies in product engineering, traditionally working with independent software vendors to build their data products and services. Applying that expertise to insights services, EPAM has developed its Data Factory Blueprint to deliver business value through data products across industries and functional domains. It now offers over 200 vertical-specific analytics accelerators and consulting programs.

EPAM's customer references reflect this industry and use-case diversity. References consider EPAM "well ahead of their peers" with a "fantastic approach to building a talent pipeline" and an "ability to quickly grasp domain understanding." But the vendor's universally recognized value remains in engineering skills, particularly Agile, DevOps, and cloud. EPAM's insights services offering reflects a growing capability. To complement its recognized engineering skills, EPAM must continue to develop consulting and advising capabilities to fully address customer needs.

- › **Fractal Analytics demonstrates that pure play can mean top tier for insights services.**

Fractal Analytics demonstrates continuous investment in research and development with a portfolio of both horizontal and vertical assets. For example, Cuddle.ai provides business users with personalized, contextual insights. Qure.ai uses deep learning to help doctors accurately diagnose diseases and recommend personalized treatment. And Eugenie.ai detects anomalies in high-velocity data. Fractal's "Data to Decision" methodology supports insights delivery and implementation, whether that's through automated processes or human decision making. FinalMile's EthnoLab, which leverages behavioral economics, cognitive neuroscience, and design, guides engagements that require process redesign and choice architecture. The ability to design and test various behavioral "nudges" differentiates Fractal from others in the evaluation.

Among customer references, Fractal is considered "top tier" among both analytics pure-play providers and the bigger consulting firms. The vendor delivers cutting-edge technology and strong consultative resources. Teams bring external thinking and give recommendations proactively. Customer references participate in Fractal's advisory board meetings and appreciate the ability to network and the exposure to new ways of thinking. References unanimously report Fractal to be extremely receptive of input on both project-level enhancements and the service portfolio roadmap. Fractal is a strong choice for a collaborative approach to insights services.

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Strong Performers

- › **If life sciences sales and marketing is the question, ZS is likely the answer.** With over 80% of its business in pharmaceuticals and healthcare and over 90% of use cases in sales and marketing, ZS is an outlier in this evaluation. Within this highly specialized industry and functional space, the rest of its services offering focuses on decisions and data. For example, ZS predicts when a physician might prescribe a certain drug and helps sales teams prioritize prospects and allocate resources to specific geographies. To support these types of engagements, ZS has curated an extensive portfolio of data partners with extremely niche providers.

According to customer references, ZS brings a powerful combination of business domain knowledge, cutting-edge technology skills, and innovative analytic methods. The ZS teams serve as an external data science organization, developing models and managing deployment of those models with onsite teams of product managers. All references were extremely satisfied with their engagements and would recommend ZS. Two of the three references were in pharma, and all engagements were oriented toward sales and marketing. ZS is the most specialized of the specialized insights service providers in this evaluation.

- › **Alibaba Cloud is a powerhouse for cloud-based infrastructure and insights services.** Alibaba Cloud delivers an end-to-end cloud-based insights platform, including its Data Middle Office for data management and governance and its big data analytics and AI platforms with DataWorks, MaxCompute, and Platform of Artificial Intelligence (PAI) components. A portfolio of industry-specific decision support platforms — Industrial Brain, City Brain, Agricultural Brain, and Aviation Brain — facilitate collecting data from the physical world, performing real-time analysis, and delivering insights through a digital twin decisioning platform. Insights offerings are all cloud based, leveraging Alibaba's cloud infrastructure. While its strength lies in a vast portfolio of products, almost half of engagements start with consulting services. Alibaba Cloud is a strong choice for cloud-based insights infrastructure and business services, but only in China or Southeast Asia.

Customer references strongly endorse Alibaba Cloud's insights services across diverse industries. All engagements started by building a data platform to centralize data and migrate to a cloud environment. However, all references also leveraged the platform and ecosystem to develop business-specific solutions and deliver business value. Alibaba Cloud conducted extensive interviews to understand the business problems; for one reference, a crowdsourced contest identified new models. Projects included change management, primarily for the technology and training operators or marketers to use new tools. Despite having a solid methodology, Alibaba Cloud's project management could use improvement, according to customer references.

- › **Telefónica's unique data assets differentiate its insights services.** Telefónica's broad portfolio of industry- and domain-specific solutions leverage its unique data assets. These assets include both customer data (e.g., household typology, affluence, average revenue per user, product history, and customer lifetime value) and network data (e.g., call and text records, data records, social network analysis, location, weblogs, and other usage patterns). Newly developed AI capabilities and prebuilt

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customer segmentations based on data analysis accelerate insights delivery. Recognizing the need to upskill both its employees and customers, Telefónica has developed LUCA Academy, offering business and technical courses as well as programs to guide broader, insights-led transformation.

Telefónica's strengths were obvious in its customer engagements. While references primarily selected the vendor for its data assets, Telefónica worked with customers to develop analytic models, build business cases, and deliver insights. Engagements, however, did not reflect a strong vendor role throughout the end-to-end insights process. Telefónica enjoys a first-mover advantage among telecom providers and remains a leader in leveraging unique customer and network data to deliver business insights. But Telefónica must keep an eye on its rearview mirror as other telecom providers launch insights services.

- › **West Monroe offers a balanced approach to insights services.** West Monroe was founded as a business and technology consulting firm, and that heritage shows in its portfolio and customer engagements. West Monroe considers itself large enough to tackle tough challenges yet nimble enough to deliver custom solutions. A strong change management and capacity-building practice ensures the sustainability of its insights outcomes. From a strategic perspective, West Monroe has a significant investment portfolio, but it does not articulate a strong vision or strategic enhancements to its portfolio. Outside of its daily work, West Monroe donates “1% of time, talent, and treasure” to improving its local communities and supporting organizations important to its employees.

West Monroe has established a strong niche market by serving private equity clients. The two references interviewed fell into this category. One was a private-equity-backed company; the other a private equity group engaged in a public-private partnership with a city. Both references report using West Monroe to get their data house in order and improve visibility into their operations and revenues. Both report that the balance of technology and consulting capabilities drove their vendor selection. References attributed positive outcomes to their engagement and would recommend West Monroe.

Contenders

- › **Teradata aspires to move beyond databases with analytics-powered insights services.** Teradata comes from a data warehouse heritage, moving up the value chain with Vantage, its analytics platform. Teradata wants to be the foundation for analytics with its strong focus on data industrialization. Its unified data fabric promises to break down analytics silos. The idea is that its “data intelligence” fuels business intelligence. Within its new platform, Teradata offers industry data models, analytic schemas, and business use cases to accelerate analytics projects. The jury is still out.

Customer references all give top scores in data capabilities. Most have a data warehouse relationship, yet few are fully leveraging Teradata's newer analytics capabilities. One reference uses Teradata for sensor analytics in a heavy industrial environment; another uses analytics capabilities to explore the data and deliver compliance-related dashboards. These customers are satisfied

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with their engagements and report a “solid job.” For another customer that’s using only the data warehouse, Teradata’s move to become an analytics platform provider appears to have been a challenge. The coming year will be pivotal as Teradata stabilizes recent platform upgrades and extends its data warehouse capabilities in the analytics platform.

- › **For BearingPoint, it’s still early days in building its insights service practices.** BearingPoint’s insights service practice was reorganized as a cross-industry practice last fall, to be fully operationalized in 2020. Its Hypercube data and analytics platform provides industry-specific solutions that leverage machine learning and advanced analytics capabilities. Yet efforts to reuse assets across industries have only just begun; a demand forecasting tool designed for a media engagement has been adapted to prevent waste in the fashion industry. However, the new strategy is still in development, and BearingPoint did not fully communicate its vision for service enhancements, employee experience, or customer input. BearingPoint does collaborate actively with academic institutions and nonprofits, serving in leadership roles to drive data science curricula, host modeling challenges, and deliver workshops.

Customers references did not fully represent insights service engagements. One described an interesting innovation exercise that never got implemented. In another, BearingPoint advised on business process change for a digital transformation with no responsibility for analytic use cases or implementation; others had responsibility for the technology. The third reference reported an inventory optimization exercise, in which the model prototype was the final product. No implementation or significant change management was involved.

- › **LTI leverages its strong product engineering background to pivot to insights services.** LTI has a legacy in construction, engineering, and technology. In the last five to 10 years, it has pivoted to digital transformation. The newness of this shift is evident in both its strategy and customer engagements. LTI remains extremely focused on engineering and products. It has built a strong portfolio of insights assets with Mosaic, a converged platform for data and analytics services, and Leni, a front-end, self-service application. Planned service enhancements include both technology and business services, including LTI’s Integrated Value offers by verticals. All the pieces are there, but the depth of LTI’s insights strategy has yet to be proven.

Across the board, LTI’s customer references did not reflect insights service engagements. One was more of a product engineering engagement and the other a technology implementation with some data engineering. References gave mixed reviews for industry and functional expertise, business advisory services, analytics capabilities, and capability building. To boost its position in the insights services market, LTI must complement its engineering strengths with business services and deliver business value to customers.

- › **NEC is a strong technology provider but less proven in insights services.** NEC’s insights capabilities reflect its strength as a product company with a history of technology innovation. NEC has been developing biometric sensing technology since 1969. Its flagship AI portfolio, NEC the WISE, provides a comprehensive suite of AI technologies, complemented by partnerships with

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other tech providers. Its business advisory services remain limited. Now available to customers, NEC's AI Academy was established for internal skills training. There is little focus on change management or capacity building. Service enhancements focus exclusively on technology, with no details on business advisory investments. NEC does stand out with its thought leadership and collaboration, focused on diversity and technology for good.

Customer references reflect NEC's focus on technology solutions. None of the reference engagements truly demonstrated insights services from business problem to business outcome. The references were more product-oriented technology implementations or long-term research projects. While all references were satisfied with their engagement, they did not endorse NEC as an insights service provider.

Evaluation Overview

We evaluated vendors against 18 criteria, which we grouped into three high-level categories:

- › **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include business advisory services, data services (including governance and engineering), analytic and AI services, and insights delivery and implementation support, as well as engagement success factors like change management and capacity building and the vendor's current partner ecosystem.
- › **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated their services vision, looking at key factors like their planned enhancements, employee experience, and customer input strategy, as well as their ecosystem strategy, examining their investment portfolio; academic, nonprofit, and public sector collaboration; and industry consortia.
- › **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's customer base and revenue growth.

Vendor Inclusion Criteria

Forrester included 13 vendors in the assessment: Alibaba Cloud, BearingPoint, EPAM, Fractal Analytics, HCL, LTI, NEC, SAP, Telefónica, Teradata, Tiger Analytics, West Monroe, and ZS. Each of these vendors has:

- › **An advanced data competency.** Participants have in-house capabilities to extract, integrate, and engineer data from multiple sources and in various formats.
- › **An advanced analytics and AI competency.** Participants have in-house capabilities to analyze data using a wide range of advanced techniques.
- › **Functional breadth.** Participants have the expertise and prebuilt assets to provide clients with insights services across a broad list of business functions.

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- › **Vertical penetration.** Participants have the expertise and prebuilt assets to provide clients with insights services across a broad list of verticals.
- › **Heritage.** Participants represent a variety of origins, including pure-play insights providers, midtier business or technology service firms, or technology vendors.
- › **Market presence.** The service provider's insights services component of the data and analytics practice has annual revenues of at least \$50 million or the provider was recognized as a competitor by other participants.
- › **Service tenure.** Participants have offered insights services for more than two years.
- › **Client interest.** Service providers are often discussed in Forrester's client inquiry calls.

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Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by March 5, 2020, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Survey Methodology

The Forrester Analytics Global Business Technographics® Data And Analytics Survey, 2019, was fielded in March and April of 2019. This online survey included 3,417 respondents in Australia, Canada, China, France, Germany, India, the UK, and the US from companies with 100 or more employees.

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Forrester Analytics' Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Dynata fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. Please note that the brand questions included in this survey should not be used to measure market share. The purpose of Forrester Analytics Business Technographics brand questions is to show usage of a brand by a specific target audience at one point in time.

Endnotes

- ¹ See the Forrester report "[Ten Ways To Prepare For The Next Recession](#)" and see the Forrester report "[Beyond Agility – Adaptive Enterprises Hold The Winning Hand.](#)"
- ² Source: Forrester Analytics Global Business Technographics Data And Analytics Survey, 2019.
- ³ Source: Forrester Analytics Global Business Technographics Data And Analytics Survey, 2019.
- ⁴ See the Forrester report "[Now Tech: Insights Service Providers, Q1 2020.](#)"
- ⁵ As the services market has evolved, enterprise insights service providers have developed proprietary business and technology assets to accelerate engagements. Investments, acquisitions, and partnerships complement their traditional capabilities. Firms should consider these providers if they require significant strategy consulting and deep expertise in stitching together complex data and analytics systems. Existing relationships also play into the decision, as longevity brings understanding of business context.
- ⁶ Technology and telecom vendors leverage their unique assets to offer insights services as an add-on to existing products or services. Many pure-play insights providers have evolved from staff augmentation models with new tools and technologies to complement experienced and skilled workforces. Firms should consider these providers if they have an existing technology, infrastructure, or staff augmentation relationship or find a specific offering that meets their needs. These providers come from diverse backgrounds but often rival the larger or more established services firms.
- ⁷ Global services decision makers were asked about the benefits of using external consultants, agencies, and service providers. The top responses were as follows: 1) The providers help us complete the work faster; 2) we need an outside perspective to think about our business model, organization, processes, technology, and/or applications in new innovative ways; 3) we can use established best practices of our providers; 4) we want to take advantage of the third party's content or data sets; and 5) the providers are more effective at organizing and coordinating the business and technology stakeholders in our firm. Source: Forrester Analytics Global Business Technographics Business And Technology Services Survey, 2019.
- ⁸ Source: Forrester Analytics Global Business Technographics Data And Analytics Survey, 2019.
- ⁹ Source: Forrester Analytics Global Business Technographics Business And Technology Services Survey, 2019.
- ¹⁰ See the Forrester report "[Now Tech: Insights Service Providers, Q1 2020](#)" and see the Forrester report "[Partner Strategically To Accelerate Your Insights-Driven Business.](#)"
- ¹¹ ERP: enterprise resource planning.

We work with business and technology leaders to drive customer-obsessed vision, strategy, and execution that accelerate growth.

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