Magic Quadrant for Global Business Intelligence and Performance Management Service Providers

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Consulting and system integration companies partner with clients in developing business intelligence solutions. Buyers of BI services expect broad support of information management and information analysis strategies. There is much change in the market, with service providers increasing investment.
WHAT YOU NEED TO KNOW

This Magic Quadrant analyzes the market of implementation services for information management (IM; e.g., data management, data quality and data warehousing), information analysis (e.g., analytics, reporting and visualization), and performance management (PM) solutions. The relative positioning of service providers in this Magic Quadrant is based on key criteria for evaluating the ability to execute and completeness of vision. To enable user adoption, consulting and system integration (C&SI) companies must provide a blend of business, industry, technology and program management skills that are aligned with the objectives of a project, institutional and business cultures of a buyer, and organizational capability. All selection processes are enterprise-specific; consequently, your analysis should be specific to your business intelligence (BI) project requirements. This market is very dynamic and is evolving considerably, with service providers investing heavily to meet client demands.

MAGIC QUADRANT

Figure 1. Magic Quadrant for Global Business Intelligence and Performance Management Service Providers

Market Overview

Service providers evaluated in this Magic Quadrant offer solutions that span the Gartner business intelligence, analytics and performance management (BAP) framework, which covers a continuum of tactical to strategic needs (for more information, see “Gartner’s Business Intelligence (BI) Framework for Enterprise Applications”.)
Intelligence, Analytics and Performance Management Framework”). The BAP framework represents the elements necessary to execute a complete BI program that may include strategy, people and processes, PM, analytics, BI platform, and IM infrastructure. These framework components are coordinated through the program management required to synchronize enablers, producers and consumers of information to realize the business value of a successful BI program.

The C&SI market in 2010 is forecast to reach $296.7 billion, which represents market growth of 2.1% in constant currency compared with 2009 (for more information, see “Forecast Analysis: Consulting and System Integration Services, 2007-2014, 4Q10 Update”). A new era of caution and cost consciousness has stalled or reduced spending on new systems and major upgrades, or has led to a more detailed understanding and, in some cases, more funding to achieve bottom-line business benefits. As a result, service providers have had to not only concentrate on offerings that add tangible value, but also focus on shorter-term projects. The demand for BI services has consistently grown as more related issues are tied to this market. Gartner has seen service provider offerings mature for business intelligence competency centers (BICCs), and this maturity has been driven by:

- Standardization of products and platforms (primarily to “megavendor” offerings)
- Deployment of service-oriented architecture (SOA) to assist with IM and process integration
- Globalization that requires IM and information analysis consistency
- Evolution of financial regulatory requirements pertaining to financial reporting, International Financial Reporting Standards (IFRS) and eXtensible Business Reporting Language (XBRL)
- Decision support using analytics tools
- Growing interest in a Pattern-Based Strategy approach

In the last year, the information analysis category has been expanding with more software products for areas such as social analytics and text analytics. Service providers have especially focused on offering a broader range of business analytics. This global BI service market is very dynamic and has evolved considerably over the last year with service providers investing heavily to meet client demands. “Business analytics” has become an important and popular term to describe the greater analysis that can be accomplished through analytics tools that are added or embedded into business applications; for example, customer analytics has been an area of strong demand, in addition to areas such as spending analytics or retail analytics. Business analytics positions BI solutions from a business-centric view of the market, incorporating processes and methodologies, platforms for analytics, PM and business applications. Analytics generally requires the combination of multiple capabilities that include analytics platform, process context and application integration.

The drive to round out capability for business analytics is strongly tied to a well-deployed consulting capability, and management consulting providers have made acquisitions to close the loop. Accenture focused on the technology side and established a broad partnership for skills, assets and platforms with SAS Institute, and separately it acquired CadenceQuest for marketing analytics software. There have been other acquisitions that focus on expanding skill sets: for example, PricewaterhouseCoopers (PwC) acquired Paragon Consulting and Diamond Management & Technology Consultants for corporate performance management (CPM) experts; KPMG acquired Analitica for Hyperion experts; Ernst & Young acquired Global Analytics for CPM experts; and Deloitte acquired Pathfinder Solutions for analytics expertise and acquired ReportSource with experts on PM for IT. The combination of mature analytics platforms,
accessible information stores and buyer interest in greater support for decision making has driven an emphasis in positioning, whereby many service providers have switched from a data warehousing focus to an analytics focus, reflecting an interest to deliver business value through information analysis. Gartner expects demand for business analytics to grow in 2011, as buyers now have an expectation that business applications will be analytics-enabled.

This Magic Quadrant evaluates vendors in the market according to the ability of C&SI firms to meet the need for global BI delivery capability. Part of our evaluation involved a customer survey from vendor-supplied references. References rated their experience with the service provider; we used the ratings to inform our evaluations for ability to execute. A total of 116 references responded to our survey for the companies evaluated in this Magic Quadrant, and each provider received between four and 22 responses from its client base. Service providers are becoming more advanced in their completeness of vision. Overall, we have found that service providers evaluated are creating more global practices to deal with IM and information analysis issues consistently. Service providers are also helping buyers in their maturity and standardization of management processes, leading to higher interest in a broader PM strategy and additional analytics capabilities.

Nonetheless, differences in service providers' offerings continue. These major differences can be categorized according to the following five dimensions that are integral in understanding both the vision and execution evaluation criteria:

- Service line offering (such as strategy for the business or technology, implementation of a solution and operation of the solution).
- Capability breadth (such as a single technology or support for a variety of areas, including data warehousing and reporting, CPM, enterprise IM, master data management [MDM] and data quality, etc.).
- Industry coverage (for example, support for a single vertical market, such as financial services, government, retail, healthcare, etc., or no specific sector specialization when capability is the focus).
- Geographic presence (for example, from a single country or major region, with fewer providers having worldwide coverage).
- Business process (for example, the understanding of processes, such as “order to cash,” “procure to pay” or finance function, etc., or no specific specialization).

Most providers have focused their delivery practice on support for two of these five dimensions due to complexity in covering all dimensions. A broad group of providers offers implementation services, particularly in each major region for applications and tools in this BI and PM service market. That broad market is not evaluated here. However, a select group of providers can bring a global perspective to initiatives that follow the BAP framework by providing services across regions or unifying strategies across an organization or agency. Global initiatives are differentiated from traditional projects because of the complexity of process, transformation and technology skills required. Magic Quadrants do not always include all vendors (or an exhaustive list of vendors) in a given market. Vendors evaluated here meet our inclusion criteria.

Gartner inputs into the criteria of the service providers that are evaluated include the service providers’ current and potential market impact and how often Gartner analysts’ interactions with clients result in some type of interest in specific providers. We have not covered the information storage area in this analysis that would include other providers, such as Dell and EMC. Gartner finds there are many pockets of different types of companies that focus on only specific
components of the BAP framework (for example, software vendors, such as Oracle and SAP, and specialist providers, such as Palladium Group, Saama Technologies and Virtusa).

The companies evaluated in this document strive to act as advisors and provide service depth across multiple levels of the BAP framework and, thus, deliver to all major service dimensions discussed in this document and organize themselves to deliver across the expert areas they choose. This approach and the inclusion criteria documented in this research are applied in evaluating the capabilities of all types of vendors to determine the potential inclusion of their C&SI offerings to end-user clients (see "The Gartner BI, PM and IM Services Vendor Guide").

Market Definition/Description

BI, analytics and PM (BAP) solution services include professional services offerings to optimize an enterprise's processes and integrate related technology applications and platforms, which include application-related work. Methods of purchase and service line definitions are available in "Dataquest Guide: IT Services Market Research Methodology and Definitions."

BAP solution services reviewed here are offerings to design, develop, and deploy specific processes, functions, applications or initiatives in user organizations. These services aim to optimize a company's processes and integrate related technology applications and platforms.

BAP solution services aim to provide effective alignment and integration of BI, analytics and PM initiatives based on the BAP framework. BAP services encompass the BAP framework model that includes IM infrastructure, BI platforms and analytics applications, organization (people and processes), PM applications and business strategy, as described in "Gartner's Business Intelligence, Analytics and Performance Management Framework."

Inclusion and Exclusion Criteria

The following criteria must be met by external service providers (ESPs) to be included in this Magic Quadrant. This assessment excludes many additional specialty, boutique or regional service providers that offer varying levels of BI services that range from consulting to implementation services to managed services.

- Geography — Service providers' ability to service clients globally were reviewed for this research. By globally, we mean the major regions (North America, Western Europe and Australia) and secondary regions (Eastern Europe, the Middle East, Mexico, Latin America and Asia/Pacific — including India, China, and the rest of Asia/Pacific but not including Japan). Where appropriate, related capabilities to effectively execute the delivery model chosen by the ESP (i.e., on-site and/or off-site, global delivery) were reviewed as well.

- Service providers must have market momentum for BI solutions, as observed by Gartner.

- Service providers must have established a practice that provides the thought leadership and delivery capability for the provider's initiatives across Gartner's BAP framework, which is separate from other practice areas (such as ERP).

- Service providers should have demonstrated their solutions are used and supported across the enterprise and go beyond departmental deployments. A provider should demonstrate how it can meet complex needs of customers, either directly or through service delivery partners. Projects may be for regional or multinational corporations as well as government agencies.
Service providers are expected to deliver C&SI services for discrete projects (for example, projects often include a set of services for planning, requirements and deliverables) — not stand-alone staffing services, application outsourcing services, or business process outsourcing services.

Service providers must have demonstrated capability to consistently invest in methodology and internal processes, as well as invest in resource development of their global practice for BI solutions.

Service providers must have a minimum of $150 million in annual C&SI revenue attributed to its BI practice area that provides solutions that fit in Gartner's BAP framework. Service providers are expected to deliver consulting and integration services for discrete projects (projects include a set of services for planning, requirements and deliverable) — not stand-alone staffing services, application outsourcing services, or business process outsourcing services.

Added

PricewaterhouseCoopers was added to this Magic Quadrant.

Dropped

No vendors were dropped.

Evaluation Criteria

Ability to Execute

The ability-to-execute dimension in our analysis evaluates the service provider's capacity and track record implementing the services described in its strategic plan and in clients' proposals and contracts. It considers the depth and breadth of services offered at each level of the Gartner BAP framework. This ability to execute includes the service provider's demonstrated ability to satisfy clients' needs through a combination of tools, techniques, methodologies, alliance partners, and vertical and process expertise, and to deliver time-to-benefit advantage through learning reuse.

Product/Service — Provider's core services that compete in and serve the defined market. This category includes current service capabilities, quality, feature sets, skills and so on. This category also includes solutions related to the Gartner BAP framework, such as project management, delivery processes and methodologies; and assessment of knowledge and resourcing of major products that fit within the framework.

Overall Viability (Business Unit, Financial, Strategy, Organization) — Financial viability includes an assessment of the overall organization’s financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue to invest in the service and continue to offer the service, advancing the state of the art for BI services within the organization’s portfolio of services. Subcategories include: assessment of the service provider's practice area profile (for example, financials, resources, utilization and attrition); and analysis of strategy and organization.

Sales Execution/Pricing — The service provider’s capabilities in all presales activities and the structure that supports them. This criterion includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

Market Responsiveness and Track Record — Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve, and market dynamics change. This criterion also considers the provider's history of
Responsiveness. Subcategories include: specific client feedback; and demonstrated ability to adjust to market conditions.

**Marketing Execution** — The clarity, quality and efficacy of programs designed to deliver the organization’s message to influence the market, promote the brand and business, increase service awareness, and establish a positive identification in buyers’ minds regarding the organization.

**Customer Experience** — Relates to the customer feedback and customer experience, including expectations and ability to meet customer expectations.

**Operations** — The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, such as skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis. Subcategories include: organization and business model; and global delivery model (downstream capabilities).

### Table 1. Ability to Execute Evaluation Criteria

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting</th>
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<tbody>
<tr>
<td>Product/Service</td>
<td>high</td>
</tr>
<tr>
<td>Overall Viability (Business Unit, Financial, Strategy, Organization)</td>
<td>standard</td>
</tr>
<tr>
<td>Sales Execution/Pricing</td>
<td>low</td>
</tr>
<tr>
<td>Market Responsiveness and Track Record</td>
<td>standard</td>
</tr>
<tr>
<td>Marketing Execution</td>
<td>low</td>
</tr>
<tr>
<td>Customer Experience</td>
<td>high</td>
</tr>
<tr>
<td>Operations</td>
<td>standard</td>
</tr>
</tbody>
</table>

**Source:** Gartner

### Completeness of Vision

The completeness-of-vision dimension evaluates the service provider’s strategic vision to deliver the C&SI services needed by clients in the four domains of the BAP framework. This completeness of vision includes the service provider’s depth of knowledge of BI markets, knowledge of the direction of key market trends, and knowledge of the customers it serves. The service provider’s scope of vision and the mind share it has achieved with potential buyers are important. Factors analyzed include the service provider’s commitment to its BI practices, funding and allocation of resources and skill building, and how it positions itself to address future industry scenarios through investments in R&D, methodologies, alliances and partnerships. Addressing some significant shifts in the market are required (such as the need to embed engineering sciences in decision management, to bring more analysis to large volumes of information — not just build systems to organize the information — and to bring global presence for large clients that need to integrate strategies across regions).

**Market Understanding** — Ability of the provider to understand buyers' needs and translate these needs into products and services. Vendors that show the highest degree of vision listen and understand buyers’ wants and needs, and can shape or enhance those wants with their added vision. Subcategories include: service providers’ knowledge and articulation of key market direction and trends; and the analysis of the service providers’ executive leadership (including thought leadership, continuity, operational capabilities, and so on).
Marketing Strategy — A clear, differentiated set of messages that are consistently communicated throughout the organization and are externalized via the communication, advertising, customer programs and positioning statements.

Sales Strategy — The strategy for selling services, which uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base. Subcategories include: service providers' strategies for partnerships and alliances; and vision for creating new and/or additional business within the BAP framework.

Offering (Product) Strategy — A service provider's approach to product development and delivery that emphasizes differentiation, functionality, methodology, and feature set as the offerings map to current and future requirements.

Business Model — The ability of a service provider to integrate operations, organization (business unit, financial, strategy and organization), service offerings, vertical/industry strategies, geographic strategies and other specific components to address the necessary issues to operate effectively.

Vertical/Industry Strategy — The service provider's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including verticals.

Innovation — Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy — The service provider's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

Table 2. Completeness of Vision Evaluation Criteria

<table>
<thead>
<tr>
<th>Evaluation Criteria</th>
<th>Weighting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Understanding</td>
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</tr>
<tr>
<td>Marketing Strategy</td>
<td>low</td>
</tr>
<tr>
<td>Sales Strategy</td>
<td>standard</td>
</tr>
<tr>
<td>Offering (Product) Strategy</td>
<td>high</td>
</tr>
<tr>
<td>Business Model</td>
<td>standard</td>
</tr>
<tr>
<td>Vertical/Industry Strategy</td>
<td>standard</td>
</tr>
<tr>
<td>Innovation</td>
<td>standard</td>
</tr>
<tr>
<td>Geographic Strategy</td>
<td>standard</td>
</tr>
</tbody>
</table>

Source: Gartner

Leaders

Leaders provide offerings that meet demand, as well as demonstrate the vision necessary to sustain their position as requirements evolve in the market. Leaders take chances and typically respond to a wide market audience by supporting broad market requirements in an attempt to help shape the market. This includes delivering BI solutions across all levels of the BAP framework. However, they may fail to meet the specific needs of more-specialized segments (for example, technology, applications, geographic and process segments).
Challengers

Challengers have a strong ability to execute but need to fully match service offering delivery with evolving global demand and the dynamic market direction, as defined by the Gartner BAP framework. Although Challengers typically have sufficient scale and financial resources, they may lack the breadth of vision, innovation or overall ability to impact market development. Challengers become Leaders when their vision develops in concert with their ability to maintain a high level of execution. This market is dynamic, and many providers are investing to cover global breadth and changes in capabilities needed.

Visionaries

Visionaries align with Gartner's view of how the market is evolving, but they have less-proven capabilities to deliver against that vision today. This may reflect a competitive strategy, such as selling an innovation ahead of mainstream demand, aligning execution capabilities with that innovation, or early attempts at differentiating in the market.

Niche Players

Niche Players do well in a segment of the market, or they have limited ability to innovate or outperform other service providers due to the high investment demands required to compete across all aspects of the BAP framework. This may be because they focus on a domain, vertical market or geographic region. Their ability to execute can be affected by the focus areas of expertise as well as customer perception of services, and, therefore, these Niche Players are assessed accordingly. Niche Players are often in the process of establishing a strong vision for their offerings and developing the scale to execute.

Vendor Strengths and Cautions

Accenture

Accenture is a global public company offering a broad set of IT services and solutions. The company has practices for analytics and IM. Gartner estimates that in 2010, the company had approximately $1 billion in global BI service revenue and about 8,500 professionals throughout the Americas, Europe and Asia/Pacific. Accenture goes to market by industry and is a good fit for enterprises requiring a balance of business consulting advice with complex technology execution for their BI solution initiatives.

Strengths

- Accenture takes an issue-driven and outcome-focused approach for client business needs with a primary focus on retail, telecommunications and public-sector industries for BI solutions.
- Accenture has made both information analysis and IM services a priority; this includes investing with SAS Institute in developing an analytics strategy to build out business analytics solutions for clients; this new group is named Accenture Analytics.
- Accenture's PM solutions are offered through its respective management consulting areas, bringing domain breadth for talent management and finance and performance management, for example.
- Accenture's clients cited its professional management of project timeline and budget as a success factor; and clients cited overall satisfaction with the BI solution for value and capability.
Cautions

- Accenture's BI solution experts reside in multiple groups, and clients sometimes find it difficult to understand the complete staffing solution for global delivery and subject matter experts.

- Accenture's clients that are smaller in size report finding it difficult to work with the company. Accenture is more-suited to large clients with transformation projects that require its end-to-end capabilities.

- Accenture's clients sometimes indicate difficulty absorbing Accenture's methodology and approach when Accenture takes ownership of the project, which can overcomplicate the project execution.

Business & Decision

Business & Decision is a specialist BI service provider that has expanded its business beyond its core client base in France. Gartner estimates that in 2010, the company had more than $225 million in global BI service revenue and 2,500 professionals throughout Western Europe, Asia/Pacific and North America. Business & Decision is well-suited for clients that focus on establishing a BI approach with an emphasis on information analysis components that complements the provider's predefined global PM strategy.

Strengths

- Business & Decision, with an established presence in Western Europe, specializes in solutions focused on information analysis and PM, with more than 60% of revenue coming from this area.

- Business & Decision has demonstrated strength in implementation of BI solutions, which are centered on the following industries: banking (retail and investment banking), insurance, life sciences (including pharmaceutical, biotechnology, and medical devices), telecommunications/media, high tech and consumer industries.

- Business & Decision's clients commend the company on its product expertise (for example, SAS) and its flexibility with clients (for example, consultant availability). This extends to responsiveness to client needs for service center localization, service-level agreement (SLA) customization, and handling of multiple technologies.

Cautions

- Business & Decision has added global capability (with new offices in Poland and Hong Kong), but about 50% of its revenue comes from France, and the majority of its revenue is in Europe, making it strong there but not capable of taking the lead for global analytics and PM initiatives.

- Business & Decision has limited global delivery capability, which is not substantial enough to provide scale for large information management initiatives.

- Business & Decision's clients sometimes rate the company low for achieving business objectives, reflecting that it is hired more for its product capabilities than for its leadership of business issues.
Capgemini

Capgemini is headquartered in Europe and has a global reach. The company has a global Business Information Management (BIM) practice. Gartner estimates that in 2010, the company had more than $600 million in global BI service revenue and more than 4,500 professionals throughout Europe and the Americas; with limited presence in Asia/Pacific. Capgemini's clients know the company for its industry expertise and find the company a good fit for expanding business application functionality through add-on BI initiatives.

Strengths

- Capgemini has been growing its breadth of solutions across all the industries in which it does business, including retail, life sciences, energy and utilities, financial services, telecom, government and the public sector. It offers a broad set of IM solutions and global sourcing (Rightshore) options.

- Capgemini continues to grow its breadth of reach — for example, through its majority stake in CPM Braxis — and its breadth of solutions— for example, in PM — to grow its global reach of offerings in BI, analytics and performance management.

- Capgemini's clients commend the company on its advice for IM strategy and customer orientation and dedication beyond just the BI engagement.

Cautions

- Capgemini's clients sometimes cite challenges for engagements that require a management-consulting-led approach to business transformation.

- Capgemini's clients sometimes indicate the company does not properly set expectations and, consequently, rate it low for underdelivering to meet those client expectations.

Ciber

Ciber is a U.S.-based public company offering a broad set of IT services. The company has a new global BI and analytics practice. Gartner estimates that in 2010, the company had approximately $175 million in global BI service revenue and more than 1,300 professionals throughout North America, Western Europe and Asia/Pacific. Ciber provides IM services, including reporting and data warehousing expertise for clients that seek regional focus.

Strengths

- Ciber's solutions for IM are focused on the company's key industries of healthcare, utilities, retail, U.S. state government, higher education and manufacturing.

- Ciber has aligned its BI and analytics practice with its Enterprise Integration and Mobility practices, which will provide innovation at the intersection of these disciplines.

- Ciber's clients indicate high levels of satisfaction for technology expertise, such as selection, implementation and integration of products.

Cautions

- Ciber has limited business consulting offerings and, consequently, is still developing a breadth of PM solutions across major functional areas.

- Clients sometimes indicate challenges with project management for projects of growing complexity, which may lead to challenges on contract management and communication.
Ciber has added more global delivery capability but has limited scale beyond its strength in North America and still has to mature in BI programs.

**Cognizant**

Cognizant is a U.S. public company with a global delivery business model. The company has a global BI, PM and analytics practice. Gartner estimates that in 2010, the company had approximately $650 million in global BI service revenue and more than 8,000 professionals. Cognizant's global presence — especially in emerging geographies, such as Asia/Pacific and the Middle East — augments its established presence in North America and limited presence in Europe. Clients with IM and information analysis needs in their BI initiatives will find that Cognizant can deliver.

**Strengths**

- Cognizant has extended BI expertise in travel, insurance, life sciences, pharmaceutical, and food and beverage industries to supplement its existing industry go-to-market capabilities in utilities, manufacturing and financial services.
- Cognizant's global delivery model approach means that approximately 75% of its resources are in India for BI engagements, which results in client praise for value and price.
- Cognizant has built on its strategic partner relationships with its customers and continues to deliver a broad and deep portfolio of BI and data warehousing capabilities. Cognizant's aim is to continue to differentiate based on customer experience and business process knowledge.
- Cognizant's clients cite strong technical skills, good communication during project execution and good breadth of capability in IM and information analysis engagements.

**Cautions**

- Cognizant's depth and breadth of capabilities to help clients with people and process issues does not match its technical breadth and depth, leaving it lacking in PM services that rely on consulting strength.
- Cognizant uses the global delivery model aggressively when required by clients, allowing faster ramp-up of staffing, but its continued growth stretches resources and sometimes presents challenges in project management, as indicated by clients.
- Cognizant has a well-established presence in the U.S. and U.K. but has limited capability in other regions, giving it opportunity to grow geographically.

**CSC**

CSC is a U.S.-headquartered company with a global reach and breadth of IT services offerings. The company coordinates its BI service offerings across regional “enterprise intelligence” practices. Gartner estimates that in 2010, the company had approximately $550 million in global BI service revenue and more than 4,000 BI professionals in the Americas, Europe and Asia/Pacific. CSC has a breadth of IM and information analysis capabilities for clients that require discrete BI solutions in their industry.
Strengths

- CSC brings a breadth of BI solutions to its primary industries, including public sector, financial services, manufacturing and aerospace and defense, technology, consumer products, health services, chemicals, and energy and resources.

- CSC delivers large and complex IM engagements, for example, for public-sector and healthcare clients focused on information systems, including data warehousing and reporting.

- CSC's clients praise the company for its experienced associates, professional approach and intimacy with the client's business.

Cautions

- CSC has invested in limited ways to develop its own tools and accelerators for BI solutions, instead relying on marketplace software products, so its own repeatable solution maturity is somewhat constrained.

- CSC's clients sometimes indicate that the company can be expensive relative to its peers.

- CSC continues to invest in global delivery capabilities but has not achieved broad marketplace acceptance for its growing breadth of options.

Deloitte

Deloitte is a global accounting, tax, consulting and advisory firm with a broad IT services portfolio. The company has major practice areas to deliver its BI service offerings across regions under the Deloitte Analytics brand. Gartner estimates that in 2010, the company had approximately $1 billion in global BI service revenue and more than 4,500 BI professionals in the Americas, Europe and Asia/Pacific. Deloitte is a good fit for organizations that are addressing complex business issues that can be defined by business outcomes and not just technology requirements.

Strengths

- Deloitte has local practices across the globe for IM and information analysis aimed at developing solutions in its target industries of consumer products, energy, financial services, insurance, life sciences and healthcare, manufacturing, and the public sector.

- Deloitte goes to market with its integrated advisory capabilities, which represent a breadth of consulting and technical services that support solutions across the BAP framework and extend to broad transformation initiatives.

- Deloitte's clients indicate that consultant experience is well-supplemented by its institutional expertise and that consultant commitment translates to effective client partnership.

Cautions

- Deloitte's development of its IM solutions provides methodologies and frameworks for clients, but its ability to scale resources may be limited for large technology engagements.
Deloitte's investment in its business analytics capabilities is showing client acceptance, but consistency across regional practices is not yet fully established across its consultant base.

Deloitte's clients cite engagements to be expensive, so clients have high expectations of value for fees.

**HP**

HP is a U.S.-based global technology and outsourcing company. The HP practice of Business Intelligence Solutions (BIS) is part of the larger HP BI global solution offerings. Gartner estimates that in 2010, the company had approximately $425 million in global BI service revenue and more than 3,500 BI professionals in the U.S., Western Europe and Asia/Pacific regions. HP has developed information storage, IM and information analysis solutions, and it has long-standing expertise in data warehousing and reporting engagements.

**Strengths**

- HP takes its BI solutions to market for IM and information analysis, and it partners with HP Labs for analytics rigor through its core industries of financial services, communications, media and entertainment, and healthcare and life sciences.
- HP excels in BI engagements in which its main strength lies in the technology and implementation aspects of the work, partnering with its client's established strategy.
- HP's clients cite strong methodology and capability in data warehousing as a differentiator, as well as solutions for managing the performance of the IT organization.

**Cautions**

- HP's focus on information storage and systems has slowed its investment in business transformation capabilities and PM solutions that are dependent on business consulting.
- HP is starting to leverage its breadth of capability across different parts of the company but needs to demonstrate to clients how HP business units can serve its clients' end-to-end needs.
- HP's clients sometimes indicate that project management can be a challenge when scope and requirements are not completely established in the beginning of an engagement.

**IBM Global Business Services**

IBM is a global technology, services and outsourcing company. IBM Global Business Services (GBS) is the consulting group that has established a practice to lead it in BI solutions through its own branded practice — Business Analytics and Optimization (BAO). Gartner estimates that in 2010, the company had revenue in global BI services approaching $2 billion and about 8,000 BI professionals in the Americas, Europe and Asia/Pacific. IBM is a good fit for clients both looking for a complete solution stack for information analysis and IM initiatives that can be complex and requiring business and technology skills within their industry.

**Strengths**

- IBM GBS has the business, industry and domain expertise to deliver a compelling information-led solution for BI and analytics engagements. Its business value accelerator "quick win" approach, in particular, is gaining fast adoption.
• The IBM company investments and acquisitions of Clarity Systems, Netezza and OpenPages, among others, along with core IBM products, such as Cognos TM1 and SPSS, and added capability through IBM Research bolster its credibility for its BAO solutions.

• The IBM company has broader initiatives under a Smarter Planet vision to communicate how IT and operational technology (OT) systems can interact to create intelligent systems that broaden the applicability of how BI services can be applied.

• IBM GBS’s clients rated it high for technical expertise and industry knowledge; bringing best practices to an engagement; and particularly for establishing leadership in business analytics discussions.

Cautions

• Clients of the IBM BAO practice sometimes express concerns for its independence because of its direct link to the IBM software group.

• IBM GBS has a historical strength in IM areas and growing importance in information analysis, but its capabilities in PM have still to catch up in prominence to its full solutions breadth.

• IBM GBS’s references rated its software selection services low compared with the marketplace, which may be an early caution regarding the dependence of its BAO solutions, including its increasing emphasis on prepacked solutions.

• IBM GBS’s references rated its services as high-priced compared with the marketplace.

Infosys Technologies

Infosys Technologies is one of the largest India-based IT services providers. Infosys has a BI and PM practice that is part of its technology integration group that leads its global BI solutions. Gartner estimates that in 2010, the company had approximately $450 million in global BI service revenue and more than 6,000 BI professionals in North America, Europe and Asia/Pacific. Infosys is a good fit for clients seeking to expand their business application initiatives with BI capabilities while leveraging offshore implementation services.

Strengths

• Infosys goes to market in the areas of financial services, retail, manufacturing and utilities, with increasing focus on subsegments of these industries.

• Infosys’ clients cite staff commitment, flexibility and partnership approach as critical to achieving project success, as well as cite its value-priced offerings.

• Infosys is investing in developing analytics solutions as an entry point to offer PM services based on both independent platforms and Infosys platforms, such as Finacle for banking.

Cautions

• Infosys has a primary base in the U.K., but it has limited presence for BI in Europe, and it has very limited penetration in other countries in this region.
Infosys' clients sometimes rate the company low in innovation and strategic BI solutions, which are being addressed through — and expansion of — its consulting service capabilities in the BI area.

Infosys' clients sometimes indicate challenges with project management, account management and turnover, which are indicative of a practice in growth mode.

Logica

Logica is an established provider in Western Europe, and its presence in North America and Asia/Pacific is growing. Gartner estimates that in 2010, the company had approximately $300 million in global BI service revenue and more than 2,500 BI professionals in Europe, North America and Australia. Logica was among the first European service providers to establish an Indian presence; it now has global sourcing in the Czech Republic, India, Morocco and the Philippines. Logica is a strong candidate for BI service engagements when its understanding of a client’s business is important.

Strengths

- Logica demonstrates understanding of business issues in the different industries it chooses to focus on within its BI practice and, in particular, financial services, public sector, process manufacturing, utilities and communications, in which it offers tailored solutions to its clients.
- Logica has developed sophisticated structured/unstructured data analytical solutions, including credit risk, Solvency II, fraud management, churn analysis and behavioral analytics.
- Logica’s clients praise its technical capability, client understanding and engagement flexibility.

Cautions

- Logica has yet to establish a differentiated point of view and solution portfolio in PM engagements when clients seek an advisor capable of providing strategic guidance.
- Logica requires more investment to reach market expectations for geographic coverage and global delivery availability.
- Logica’s clients indicate that it offers a limited depth of its solutions in business analytics compared with its more-developed offerings in reporting and data warehousing.

PricewaterhouseCoopers

PwC is a network of member firms that offer accountancy and advisory services as well as a portfolio of IT services. PwC has centralized global coordination of BI solutions for its member firms offering the service. Gartner estimates that in 2010, PwC had approximately $350 million in global BI service revenue and more than 2,500 BI professionals in North America, Europe and Australia. PwC is a good fit for clients seeking to add BI and PM capabilities to their business application initiatives.

Strengths

- PwC has domain expertise in financial services, retail, manufacturing and telecom industries, and it is building its BI solutions to complement business challenges that clients face in subsegments of those markets.
PwC completed acquisitions to round out capabilities. For example, the acquisitions of Paragon in the U.K. and Diamond Management & Technology Consultants expanded CPM and BI frameworks designed for clients to develop an integrated approach that links strategies, metrics and planning with operational and management reporting. PwC's acquisition of BearingPoint assets in the U.S., China, India and Japan added to its growing IT services capabilities and IM and information analysis capabilities.

PwC has a strong practice in companion areas, such as governance, risk and compliance, which complement its BI solutions.

Cautions

- PwC is still growing its global execution capability in BI to meet marketplace expectations for methodologies and project management.
- PwC has wide industry domain expertise and key technology relationships with leading vendors but does not offer as comprehensive a range of support of technology products as some of its competitors.
- PwC's clients and prospects sometimes cite comparatively higher costs of an engagement, which is indicative of gaps in global delivery offerings and the high expectation clients have for fees charged.

Tata Consultancy Services

Tata Consultancy Services (TCS) is part of the Tata Group — one of India’s largest conglomerates. TCS has a broad set of IT services and a BI and PM practice that leads its global BI solutions. Gartner estimates that in 2010, the company had approximately $780 million in global BI service revenue and more than 13,000 BI professionals primarily in India delivering projects in the Americas, Europe and Asia/Pacific. TCS is suited for technology-centric projects, for projects in which information integration is key, and for engagements in which formulating an enterprise information strategy is necessary.

Strengths

- TCS has presence in financial services, telecommunications, life sciences and healthcare, and retail and distribution industries with an integrated framework (SOLAR), which is an industry-independent SOA solution linking process, data models and analytics.
- TCS's IT solutions for enterprise intelligence are expanding with a point of view that unifies situational awareness and pervasive information, thus broadening its perspective into OT for the enterprise, but these solutions have yet to gain momentum.
- TCS's clients rate it high for integrating BI solutions with enterprise application needs, and they indicate satisfaction with its ability to both scale resources for large engagements and effectively deliver at a competitive price.

Cautions

- TCS is known for its technology capabilities, but it needs to expand its PM offerings and invest in management consulting, which are necessary to establish momentum.
- TCS's capabilities in Europe are focused in the U.K.; therefore, continued expansion of local presence in other major European countries is necessary to achieve parity with marketplace expectations.
• TCS's clients sometimes cite difficulty in establishing effective organizational change management through the company, which may manifest as communication or coordination challenges.

**Wipro Technologies**

Wipro Technologies is one of the largest India-based IT services and outsourcing providers. The company has a BI and IM practice that leads its global BI solutions. Gartner estimates that in 2010, the company had $600 million in global BI service revenue and more than 7,500 BI professionals who are primarily based in India and servicing clients in North America, Europe, the Middle East and Asia/Pacific. Wipro is a good match when scale on an engagement is important in meeting information management needs and for information analysis solutions.

**Strengths**

• Wipro offers a range of BI solutions for primary industries of banking, communications, consumer products, energy and utilities, pharmaceutical, retail, manufacturing, and insurance. Wipro differentiates solutions in these industries with an information platform that connects and integrates various information management components; this platform is product-independent.

• Wipro has increased investment in accelerators, predefined solutions and broad delivery options through its global delivery network to offer more fixed price offerings, which result in consistent quality.

• Wipro's clients comment that management commitment was outstanding and contributed to project success.

**Cautions**

• Wipro's BI solutions are increasingly aimed at moving clients from implementation to outsourcing, and clients need to evaluate the applicability of this approach to their own sourcing strategy.

• Wipro has added capabilities to address needs across the BAP framework, but more investment in business consulting advisors is required to meet marketplace expectations.

• Wipro's clients sometimes indicate that the company does not effectively employ its centers of excellence, which can lead to inconsistency in project results.

**RECOMMENDED READING**

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

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

"Forecast Analysis: Consulting and System Integration Services, 2007-2014, 4Q10 Update"

"Gartner's Business Pattern Framework Helps Identify Process Agility Requirements"

"Gartner's Business Intelligence, Analytics and Performance Management Framework"
Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Evaluation Criteria Definitions

Ability to Execute

**Product/Service:** Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability (Business Unit, Financial, Strategy, Organization):** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel.

**Market Responsiveness and Track Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word-of-mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

 Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen
to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.
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