

Magic Quadrant for Global Business Intelligence and Performance Management Service Providers

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Consulting and system integration companies are integral to strategic initiatives for information-based solutions. Organizations expect service providers to support broad information management strategies. Service providers are responding with directives to address a global market.

WHAT YOU NEED TO KNOW

A new Magic Quadrant for global business intelligence, analytics and performance management (also referred to as BAP in this document) service providers analyzes the market for implementation services of these 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. Consulting and system integration (C&SI) companies need to provide a blend of business, industry, technology and program management skills that must align with a project's objectives, institutional and business cultures, and organizational capability. All selection processes are enterprise-specific; consequently, this analysis may prove to be different from your requirements. We evaluate the service provider's ability to lead clients in their next-generation information management (IM) needs.

MAGIC QUADRANT

Market Overview

Initiatives evaluated in this new Magic Quadrant analysis span the Gartner BAP framework across a continuum of tactical to strategic needs (for more information, see "Gartner's Business Intelligence, Analytics and Performance Management Framework"). The BAP framework is the latest iteration in the evolving perspective Gartner has on this market. Gartner has captured the elements of strategy, people and process, performance management (PM), analytics, business intelligence (BI) and IM in the BI and PM framework and is now explicitly calling out the importance of analytics. Gartner believes that solid strategy unites the elements discussed in the BAP framework based on how analytics roles are managed across a business cycle or as a program. This includes the critical people and process issues associated with the business strategy that is established for the BI, analytics or PM project. As part of the coordinated organizational change required, a Pattern-Based Strategy is needed for an organization to manage information for needs that span the BAP framework. Demand for BI and PM services is strong across industry sectors and for a multiple of technologies and products. Gartner expects this demand to grow in 2010 and be a strong performer in the total C&SI (computing) market, which includes business application services, application development and application implementation services.

This Magic Quadrant is new and categorizes the market according to the ability of C&SI firms to meet the emerging need for global BAP delivery capability in a "seek-model-adapt" fashion. In creating this Magic Quadrant, we have made a comparison of service providers to

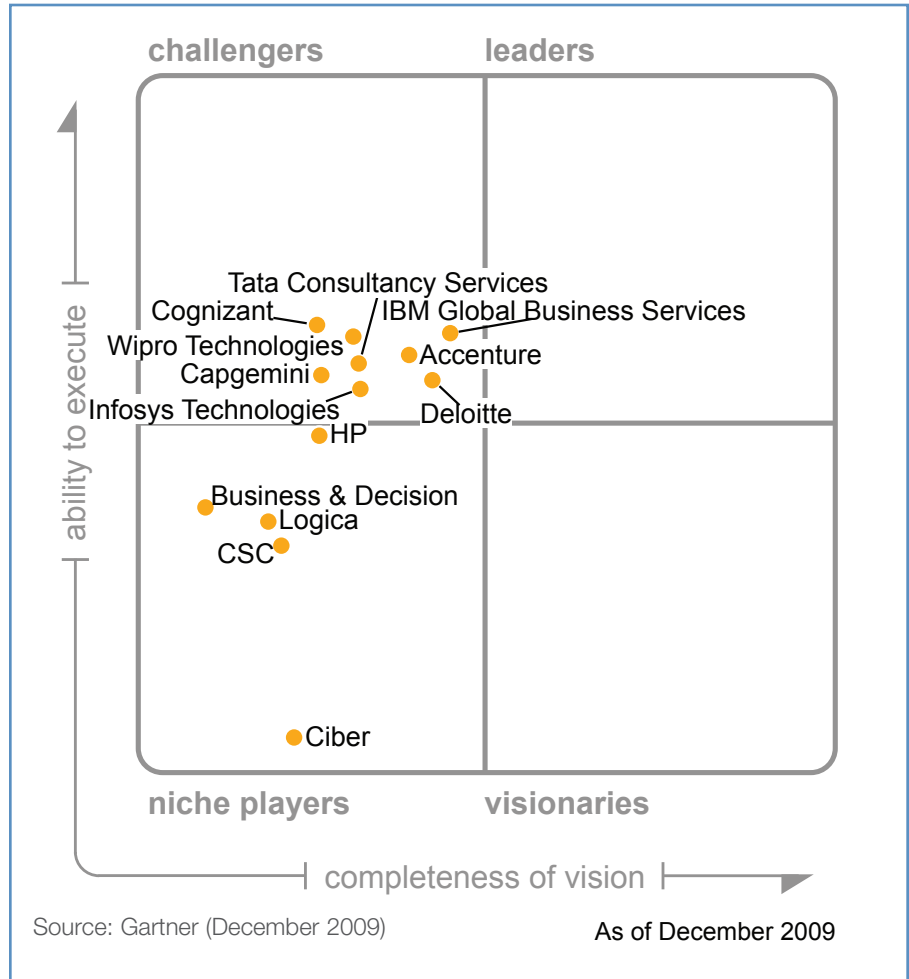
their offerings for clients to complete projects that span the BAP framework. As these projects become more complex because of the multiple competency areas required, an added depth is required for capabilities spanning all levels of analytics, BI and PM (within C&SI firms and client organizations) and with regard to the people and process aspects of a solution. And along with this expanded worldview comes a greater need for integration to other domains, such as enterprise applications and content management. Our observations from vendor briefings and customer interactions are that there currently are no clear market leaders.

Part of our evaluation involved a comprehensive customer survey from vendor-supplied references. References rated their experience with the service provider; we aggregated the ratings to develop a ranking of customer experience. Eighty-six references responded to our survey for the companies evaluated in this Magic Quadrant, and each provider received between three and 13 responses from its client base. We used this small sample as a proxy for the customer experience criteria.

Although vendors are differentiated in terms of their ability to execute, they are largely undifferentiated at this stage in their completeness of vision (especially with regard to market understanding, sales and product strategies). Our reasons that led to this conclusion are as follows:

- Historically, the C&SI companies have had geographically disparate practices.
- C&SI companies have had functionality disparate practices across different elements of the BAP framework.
- C&SI companies have had disparate capabilities across a number of different vertical markets.
- C&SI companies are at different levels of maturity in offering solutions to meet these emerging market needs.

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



- Buyer maturity and standardization of management (rather than operational) processes have been low, leading to roadblocks in the successful implementation of solutions for BAP. C&SI companies often follow client maturity and lag in the experience level as a result.

For these reasons, no leaders are identified in this Magic Quadrant. Our anticipation is that this situation will change as the market matures and as the service providers refine their approaches and practices to be more in line with this new market opportunity, and as more customers adopt these emerging best practices.

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In our evaluation of the service providers, we observed significant differences in their offerings. These major differences can be categorized according to the following five dimensions that are embedded in 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, BI, corporate performance management, enterprise IM, master data management [MDM], 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 their scale. Our analysis indicates that the service providers are just organizing to meet the market needs for more-comprehensive support for all five dimensions. For example, IBM established its own consulting practice in this market in July 2009; HP reorganized its service organization in September 2009.

Service provider experience has grown as software products have quickly matured. 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. 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 specialist providers, such as Palladium Group or Saama Technologies).

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.

Market Definition/Description

BI, analytics and PM 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 are offerings to design, develop, deploy, manage and support 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 and PM initiatives based on the BAP framework. BAP services encompass the BAP framework model that includes IM infrastructure, BI platforms and analytic applications, organization (people and process), PM 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 will exclude many additional specialty, boutique or regional service providers that offer varying levels of BAP 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 BAP 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 BAP solutions.
- Service providers must have a minimum of \$150 million in annual C&SI revenue attributed to its 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

This is a new Magic Quadrant.

Dropped

This is a new Magic Quadrant.

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 BAP 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.

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

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.

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

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	Standard
Sales Execution/Pricing	Low
Market Responsiveness and Track Record	Standard
Marketing Execution	Low
Customer Experience	Standard
Operations	Standard
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

Evaluation Criteria	Weighting
Market Understanding	Standard
Marketing Strategy	Low
Sales Strategy	Standard
Offering (Product) Strategy	High
Business Model	Standard
Vertical/Industry Strategy	Standard
Innovation	Standard
Geographic Strategy	Standard
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, including delivering across all levels of the BAP framework. However, they may fail to meet the specific needs of more-specialized segments. In this Magic Quadrant for BI and PM services, there are no leaders.

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 understanding of market needs across all levels of the market. 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 just restructuring to meet the demand. A number of providers evaluated are labeled as “challengers.”

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. There are no service providers labeled as “visionaries” in this analysis.

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. Alternatively, they may be struggling to remain relevant in a market that is moving away from them. Niche players are often in the process of establishing a strong vision for their offerings and developing the scale to execute. A number of niche players appear in this analysis.

Vendor Strengths and Cautions

Accenture

Accenture had an early lead in establishing a discrete IM perspective. As the market has evolved, Accenture has integrated this perspective into its service solutions for BAP. Accenture is a good fit for enterprises requiring a balance of management consulting advice with complex technology execution within their industry for their initiatives.

Strengths

- The global delivery capability of Accenture is mature, and it is able to bring in resources from many delivery centers in nearshore and offshore locations to enable its seamless and effective delivery.
- Accenture has a value-driven approach for large and complex projects that brings together its business research and industry knowledge with project execution, leading to satisfied clients.
- Accenture clients cited its business process understanding, project management expertise and ability to deliver on large-scale business change projects as a differentiator for BI and PM management engagements.

Cautions

- Accenture is moving toward more focus on analytics to address clients' needs to outperform the market, but it needs to further define these offerings to effectively communicate its point of view to clients.
- Accenture clients that are smaller in size find it difficult to work with the company because it is more-suited to large clients with transformation projects that require its end-to-end capabilities.
- Accenture's clients indicate that the value-driven methodology can sometimes be more than necessary for the project and indicate that it can overcomplicate the project execution.

Business & Decision

Business & Decision is a specialist BI service provider that has taken risks to grow its business beyond its core client base in France. The company has expanded – organically and through acquisitions – throughout Western Europe and into North America. This growth has resulted in increasing traction from clients for projects that are more demanding. Business & Decision is well-suited for clients that focus on establishing a BI and PM approach that rolls up to the provider's predefined global strategy.

Strengths

- Business & Decision specializes in BAP framework solutions, with more than 60% of revenue coming from this area, and it grew the practice 20% year over year between 2007 and 2008.
- Business & Decision has demonstrated strength in PM application implementation, which are centered around the following industries in particular: financial services, media and telecommunications, life sciences and healthcare, consumer products, and industrial manufacturing.
- Clients commended Business & Decision on its technical expertise, client focus and flexible approach on projects.

Cautions

- Business & Decision has global capability, but most 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, and although this capability is well-integrated, it is not substantial enough to be a complete option with respect to pricing and capability.
- Clients sometimes mentioned resourcing challenges on projects, citing the provider's inability to provide the correct skills on time as a weakness when working with Business & Decision.

Capgemini

Capgemini is elevating the importance of BI in its organization and announced a Business Information Management (BIM) unit in October 2009. This is a global remit to drive consistency in its global point of view for BI, analytics and PM. The company is creating a more-coordinated approach to the marketplace to meet the changing needs of large clients for BAP projects. Clients that expand enterprise application functionality through BI initiatives will find Capgemini a good choice.

Strengths

- Capgemini is offering a broader set of delivery options for clients that find offshore delivery viable as part of an enterprise application service strategy, and so it is offering more capability in BI through this delivery method.
- Capgemini is growing its capability in Asia/Pacific, and the company maintains its strength in Western Europe and North America for BI and PM services.
- Capgemini has been growing its breadth of solutions across the BAP framework for its target industries, and the company is increasingly selected by clients for the technical expertise it demonstrates.
- Capgemini is taking an information-led approach to link technology to business issues, which can be more inclusive for business buyers of BI.

Cautions

- Clients occasionally express that BI solutions take longer than planned and that on-time delivery can suffer.
- IT buyers of Capgemini solutions should understand that the company uses proprietary facilitation techniques to diagnose client issues that may be addressed with specific technologies; therefore, this approach to solution development is aimed at business buyers.
- Capgemini is in the early stages of establishing its global BIM unit, and clients should review the solution strategy to align with the service requirements for analytics and BI projects.

Ciber

Ciber has a global presence, but its maturity in offering solutions that address the BAP framework is variable across regions. It has local offices across the globe, with primary presence in North America and Western Europe for BI and PM capability. Ciber clients that require resources for BI and data warehousing needs will find this regional focus a benefit.

Strengths

- Ciber continues to invest in its practice for BI and data warehousing in North America and uses this as a base to establish its service strategy globally.
- Ciber can access BI and data warehousing expertise from several groups at the company that include its BI and integration practice, its application service groups and its local offices.

Cautions

- Ciber's BI practice has not integrated a full set of capabilities for global delivery, and clients indicate their dependence on local options can sometimes fall short of client needs.
- Clients cite occasional challenges with project management and communication with resources on projects that require a diversity of competencies.
- Ciber has scale in each region to be included in this evaluation but has not effectively integrated its BI service capability across regions, making its offering to global clients fragmented.

Cognizant

Cognizant has broadened its BI and PM service offerings to include more capabilities for analytics services. Cognizant's global presence – especially in emerging geographies, such as Asia/Pacific and the Middle East – augment its established presence in North America. Clients seeking technology services in their BI and PM initiatives will find that Cognizant can deliver.

Strengths

- Cognizant has built upon its strategic partner relationships with its customers and continues to deliver a broad and deep portfolio of BI and data warehousing capabilities.
- Cognizant's client reference responses were above-average, reflecting the positive overall experience the company can provide; it especially scored well for customer service orientation, flexibility and technical capability.
- Cognizant clients indicate strength in BI and data warehousing solutions that are differentiated by its technology skills, along with the proprietary delivery and management tools used by the company in its implementation methodology.
- Cognizant provides a blended approach to resourcing, with approximately 75% of its resources located in India, which is important in servicing disparate needs of global corporations.

Cautions

- Cognizant's depth and breadth of people and process capabilities, including management consulting, does not match its technical breadth and depth across the BAP framework.
- 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.

CSC

CSC has established a global competency dedicated to BAP solutions. As a global company, it is growing its practice for solutions by following the BAP framework – and this is reflected in feedback from reference clients for this survey. Clients of CSC can leverage the organization across disciplines to source the best competencies required for their discrete BI and data warehousing engagements – areas in which the company excels.

Strengths

- CSC brings a breadth of capabilities across target industries, including the public sector, insurance, energy and gas, and communications, and over projects that span engagements in BI and data warehousing.
- CSC brings innovation to its engagements from complementary practices – such as enterprise applications – that get high marks for CSC’s technology and analytics expertise.
- CSC has delivered large and complex IM projects in a variety of industries – such as healthcare – which differentiate it in the market.

Cautions

- CSC reference clients in our survey scored the company low in satisfaction, and they expected higher levels of partnership.
- CSC reference client comments indicated that a central practice for BAP needs to streamline a point of view across the evolving CSC organization.
- CSC clients need to investigate the growing capability – which CSC is creating to deliver BAP engagements – to find the appropriate resource base for their engagement.

Deloitte

Deloitte has positive client feedback that reinforces its point of view for business-driven BAP solutions. Deloitte is reorganizing its capabilities to better align with its enterprise application service groups. 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 that can provide solutions across the BAP framework, and it is particularly strong in North American and Western Europe.
- Deloitte has a breadth of consulting and technical services that provide differentiation – in particular, for corporate performance management solutions that the firm offers (from broad transformation initiatives to limited-scope projects).

- Deloitte focuses on helping organizations achieve transformational business benefits, and as a result, it can demonstrate the success of its advisory-led consulting services for BI and PM initiatives.

Cautions

- On occasion, clients indicate that the subcontractors that Deloitte uses on implementations to supplement its technology resources can add complexity to large-scale projects that require extra client effort.
- Deloitte clients sometimes cite comparatively higher cost of an engagement, so there is a need to seek greater balance between value expectations and project scope.

HP

HP has core BI and data warehousing expertise in software and services that was combined into a Business Intelligence Solutions (BIS) unit in early 2009. The BIS unit leads the global presence of HP in IM, with North America and Western Europe as its base. The company’s stated strategic intent is to enhance its clients’ IT expertise in BI and data warehousing. HP works best in BI and data warehousing engagements when implementing a project in partnership with the client’s established strategy.

Strengths

- HP has a BI practice that draws strength from its other capabilities in hardware and software, and it has further expanded through the recent acquisition of EDS. HP can handle large-scale global projects, in which its main strength lays in the technology and implementation aspects of the work.
- HP has a balanced resourcing model, allowing it to effectively allocate resources from on-site or off-site locations to projects. HP has several global delivery centers that augment BI and data warehousing needs.
- Clients referenced HP’s strong technical skills and its flexible work approach as particular strengths that differentiated its work on projects for BI and data warehousing.

Cautions

- HP has followed its Knightsbridge and TTP acquisitions with the acquisition of EDS, which adds to its practice breadth, but it has proved challenging to successfully and smoothly integrate the different companies for solutions that address the BAP framework.
- HP lacks business consulting strength, which limits its offerings in PM, so clients must be clear about the desired project outcome when engaging in this part of the BAP framework.
- On occasion, clients’ satisfaction was low for HP’s ability to provide the right resources at the right time to projects.

IBM Global Business Services

IBM has a visible IM strategy that encompasses IBM Global Business Services (GBS) and created a new consulting service line in July 2009, named Business Analytics and Optimization (BAO). Increasing investment for IM solutions by IBM generates market momentum for the industry. IBM GBS and its new BAO group is a good fit for enterprises tackling complex initiatives with requirements for both business and technology skills within their industry for BAP solutions.

Strengths

- IBM GBS has the business, industry and domain expertise to deliver a compelling information-led solution for BI and analytics engagements.
- The IBM company investments and acquisitions of Ascential Software, DataMirror, Cognos and SPSS bolster its credibility for IBM GBS solutions – led by the BAO unit – across the BAP framework.
- IBM GBS clients rated it high for technical expertise and industry knowledge, and bringing best practices to an engagement.
- IBM GBS has invested heavily in developing global delivery capabilities to address the continued high demand for multiple price points in BI engagements through a combination of domestic and outsourced delivery models.

Cautions

- Clients of IBM GBS express concerns for its independence because of its direct link to the IBM software group. The software group strategy to expand its composition of solutions that span the analytics and BI areas is a double-edged sword for the BAO practice.
- IBM GBS clients indicate that the company has a more-technology-centric consulting approach, which creates a challenge for IBM GBS to raise its profile and/or awareness of its capabilities in business-led programs.

Infosys Technologies

Infosys Technologies goes to market as a global delivery provider and has successfully extended its brand into some areas of business consulting. This extension has transferred over to its BI and PM services, in which clients are satisfied with its demonstration of business-level consulting capabilities. The company is integrating its disparate BI and IM technology groups into one practice. Infosys is a good fit for clients seeking to leverage offshore implementation services and needing consulting services to help set engagement strategy.

Strengths

- Infosys continues to demonstrate to clients a more-strategic BI capability as it moves beyond point solution implementation to integrated solutions for BI and PM projects.

- Infosys is improving global delivery capabilities, leveraging its business consulting skills and achieving above-average client satisfaction scores in helping clients to achieve objectives for BI and PM projects.

Cautions

- Infosys is sometimes challenged to meet the coverage needs for global requirements when local presence is needed – in Western Europe (excluding the United Kingdom), in particular.
- Infosys must establish a differentiated point of view in PM and analytics engagements when clients seek an advisor capable of providing strategic guidance.
- Infosys clients sometimes indicate inconsistency in communication during project execution and in breadth of capability across solutions for the BAP framework.

Logica

Logica is an established provider in Western Europe. Its presence in North America and Asia/Pacific is growing. The company follows clients across geographic regions, which allows it to deliver BAP services globally. Logica clients indicate that the company is responsive to their evolving needs. Logica is a strong candidate for BI and PM projects when a service partner with understanding of the client's business is critical.

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 assists clients in identifying value and return on investment (ROI) on their BI projects and systematically works to ensure its solutions will correctly realize the client objectives.
- Clients indicate Logica's knowledge of the BI and PM areas as a strength in its portfolio of service offerings.

Cautions

- Logica is stronger in France, the Nordics, Netherlands and the United Kingdom in particular for solutions associated with the BAP framework, but it needs to build capabilities in other major regions where solutions are being offered.
- On balance, Logica clients indicate that it offers a limited depth of its solutions in PM compared with its more-developed offerings in BI and data warehousing.

Tata Consultancy Services

Tata Consultancy Services (TCS) has an integrated solution framework linking process, data models and analytics. TCS brings a unique perspective to BI and IM through an established service-oriented architecture (SOA) solution that is industry-independent. TCS is suited for technology-centric projects, for projects in which SOA is key, and for engagements formulating an IM strategy.

Strengths

- TCS has established a staffing model across its delivery organization to allocate associates more directly to clients and establish a closer partnership.
- TCS is moving toward uniting its BI and data warehousing service offerings with the demands of the market, and the company continues to focus on the key IM infrastructure components in the BAP framework.
- Clients cite satisfaction with the ability of the BI practice to scale resource needs for an engagement effectively.

Cautions

- Clients of TCS sometimes cite challenges working with consultants because of communication or coordination issues.
- TCS has a model that leverages its technology strength, which some clients indicate leans toward junior consultants for a given BI and PM initiative.
- TCS should continue to better unite the services in its business operations unit, which is focused on business processes, with the technical services that the company offers in its BI practice to demonstrate the value of business outcomes to clients.

Wipro Technologies

Wipro Technologies has established a broad set of competencies for BI and analytics offerings. Wipro is one of the largest providers globally for solutions across the BAP framework. Wipro has established a standardized service delivery approach that can bring solutions to clients with referenceable quality. Buyers of BI and analytics services find Wipro a good match when scale is important in meeting information needs.

Strengths

- Wipro offers a range of solutions across the BAP framework that is increasingly relevant as the company is selected to deliver IM solutions for global clients.
- Wipro has established a global delivery network that is responsive to global demands of clients for their BI, analytics and data warehousing services needs.
- Wipro clients cite satisfaction with price and value of projects and technical capabilities of consultants delivering those projects.

Cautions

- Wipro clients sometimes cite difficulty in establishing effective organizational change management through the company, which may manifest as communication or coordination challenges.
- Wipro has added capabilities across the BAP framework, but it needs to be more management-consulting-led to fully respond to global challenges that clients face.

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 Web site, 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.