ISG Provider Lens™

Advanced Analytics and AI Services

A research report comparing provider strengths, challenges and competitive differentiators

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Navigating data complexity and AI integration is crucial for enterprises to achieve real-time insights

The U.S. data analytics and AI market is undergoing transformative changes and a dynamic evolution driven by technological advancements, regulatory changes and enterprise demands. The market is also experiencing an accelerating need for enterprises to integrate advanced technologies, especially AI, into their business strategies.

The increased emphasis on AI, both as a tool for data science services and a key enabler of business transformation, is reshaping the landscape. Enterprises are grappling with the need to harmonize technical, statistical and business-oriented perspectives to drive more effective data-driven decision-making. This challenge is intensifying as companies recognize the necessity of business-led data science initiatives, prioritizing AI investments that are directly aligned with strategic business goals.

This trend is particularly underscored by the rise of generative AI (GenAI), hailed as the next frontier in addressing complex business challenges by automating previously manual-intensive tasks such as content generation, report summarization and predictive analytics. GenAI is seen as a critical next step in AI evolution, offering the potential to automate routine processes, assist with predictive modeling and generate advanced insights at scale.

However, U.S. enterprises continue to face a complex array of challenges as they strive to incorporate data-driven decision-making and integrate AI technologies into their business operations. The landscape is shifting rapidly, with data modernization, AI adoption and advanced analytics capabilities at the forefront of transformation efforts. However, these advancements are not without hurdles. The challenges can largely be divided into two major areas — data foundations and strategy challenges and business context-related challenges. A deep dive into these challenges

Unlocking **AI's potential** requires overcoming **data availability, quality,** and **governance** challenges.

reveals the intricate barriers that enterprises must overcome to capitalize on data and AI-driven opportunities.

Data-related Challenges

- **Data availability and quality:** One of the fundamental challenges for enterprises is ensuring the availability of high-quality data. Poor data quality can lead to inaccurate analytics, unreliable insights and misinformed decisions. Data must be accurate, complete, timely and free of errors. However, many organizations still struggle with data silos, incomplete datasets and inconsistencies across different data sources. Inconsistent data entry practices, poor data validation processes and manual data handling further exacerbate quality challenges. Enterprises need robust data quality frameworks and tools to monitor and improve the integrity of their data assets.
- **Data volume and variety:** Enterprises are generating vast amounts of data across multiple systems and platforms, leading to volume and variety challenges. With structured, semi-structured and unstructured data coming from a wide range of sources, including IoT devices, social media and transactional systems, integrating and processing this diverse range of data is a significant hurdle. The sheer volume of data also strains legacy systems, making real-time data processing and decision-making difficult.
- **Data observability and governance:** With increased regulatory scrutiny and growing concerns about data security and privacy, data observability and governance have become critical components of data strategy. Enterprises need real-time visibility into data flows, data usage and potential issues such as data quality or security risks. Ensuring data is handled per evolving regulatory frameworks such as GDPR and CCPA is essential for avoiding compliance pitfalls.
- **Inefficient data sharing and inconsistent data definitions:** In many organizations, the ability to share data across departments and functions is hindered by poor data integration capabilities, incompatible systems and inconsistent data definitions. This inefficiency limits the scope of insights drawn from data, creating barriers to effective collaboration and cross-functional decision-making.
- **Data storage limitations, data silos and inaccessibility:** Data storage limitations pose a significant barrier to enterprises' ability to scale their data analytics capabilities. Data silos restrict the free flow of data across the organization, preventing comprehensive analysis and insights. Accessing the right data at the right time remains a challenge for many enterprises, especially when data is stored in disparate systems or outdated formats.
- **Data stewardship:** Effective data stewardship is key to ensuring data is used ethically, securely and in accordance with organizational goals. However, many enterprises face challenges in defining and executing data stewardship practices, leading to issues such as data misuse, uncoordinated data management efforts and inadequate protection of sensitive information.

Business Context-related Challenges

- **Lack of customer intelligence and CX:** A common challenge for enterprises is the difficulty in building deep and actionable customer insights. A lack of comprehensive customer intelligence — especially from diverse and unstructured data sources such as social media, customer support tickets or IoT devices — limits an organization's ability to personalize offerings and enhance CX. This makes it difficult for enterprises to differentiate themselves in a competitive market.
- **Limited scalability and difficulty in real-time analytics:** As businesses grow, so do their data volumes. The inability to scale analytics to accommodate this growth, especially in real-time, becomes a major bottleneck. Enterprises need to have the ability to derive actionable insights instantly. However, many organizations face infrastructure and expertise challenges to process real-time and large volumes of data.

- **Cloud computing costs, legacy systems and talent shortage:** While cloud computing offers significant benefits, enterprises often face the challenge of rising costs related to cloud storage and compute power, especially when scaling up their analytics efforts. Legacy systems, particularly those reliant on on-premises infrastructure, further complicate cloud migration, creating friction in efforts to modernize IT environments. Talent shortage, particularly in AI, data science and cloud computing, prevents organizations from fully capitalizing on their data potential.
- **Security vulnerabilities, ethical and privacy issues:** As data-driven technologies such as AI continue to evolve, the risks associated with data security, privacy and ethics also increase. Data breaches, misuse of data and violations of privacy regulations can have devastating financial and reputational impacts. AI models can inadvertently perpetuate biases or violate ethical principles, further complicating governance and risk management.

Technology Trends Gaining Traction in 2024 and 2025

Service providers are increasingly adopting and developing innovative solutions to meet the growing demands of enterprises in data management, ML and AI deployment. By offering solutions, accelerators and tools that address challenges such as automation, scalability, security and real-time decision-making, these service providers play a crucial role in enabling organizations to harness the full potential of their data and AI investments. As new trends such as DataOps, MLOps, IoT, Edge AI and adversarial ML continue to evolve, service providers must stay agile and innovative to support enterprises in navigating these complex and dynamic landscapes.

Below is an in-depth analysis of several key service provider trends and provider offerings, highlighting how they reshape the market.

- **DataOps:** DataOps seeks to bring the same agility, automation and collaboration to data engineering that DevOps brings to software development. This approach focuses on reducing bottlenecks, improving data quality and enabling faster access to trusted data, thereby ensuring data is always ready for analysis and AI model training.
- **MLOps:** MLOps, like DataOps, focuses on streamlining the development, deployment and maintenance of ML models at scale. The MLOps trend is driven by the growing need for organizations to manage the complexity of ML lifecycle management and ensure that models can be delivered quickly, accurately and at scale.
- **AnalyticsOps:** AnalyticsOps is a specialized practice that applies DevOps principles to the management of analytics workflows and focuses on the orchestration of analytics workflows, from data preparation to generating business insights. AnalyticsOps will help streamline the process of analyzing data and delivering insights at speed and scale, ensuring analytics teams can collaborate more effectively and reduce the time it takes to generate actionable insights.
- **TinyML:** This trend is driven by the proliferation of IoT devices, where running sophisticated ML models on edge devices with limited computational power can drastically improve real-time decision-making without relying on cloud infrastructure.
- **Automated Machine Learning (AutoML):** AutoML aims to simplify the process of developing m; models by automating tasks such as feature selection, model training and hyperparameter tuning. By making ML more accessible, AutoML enables organizations to deploy models without extensive data science or ML expertise.
- **Small data:** Small data refers to manageable and structured datasets that are often more domain-specific than the massive volumes associated with big data. Small data analytics focuses on deriving insights from small and high-quality datasets that can still offer significant value for specific business applications.
- **IoT and Edge AI:** The convergence of IoT and Edge AI is a key trend driven by the need for real-time decision-making in industries such as manufacturing, healthcare, automotive and logistics. IoT devices

generate vast amounts of real-time data. By processing this data locally on edge devices using AI models, organizations can make immediate decisions without sending data to the cloud.

Enterprise Trends and Developments in 2024 and 2025

As enterprises increasingly recognize the power of data to drive business transformation, several key trends are shaping the data and AI landscape. These trends reflect the evolving needs of businesses, rapid adoption of advanced technologies, shift toward more sophisticated data management and analytics models and reimagination of how organizations manage, analyze and derive value from their data.

- **Democratization of data:** Data democratization makes data accessible to a broad range of users within an organization, empowering non-technical stakeholders to analyze and use data without any specialized skills. Traditionally, data analysis has been confined to data scientists, analysts and IT teams. However, the rise of self-service analytics platforms, low-code/no-code tools and user-friendly dashboards enables data access to business users across all levels. These platforms often incorporate NLP capabilities, allowing business users to interact with data using simple queries, enhancing the accessibility of insights.
- **AI-powered insights via augmented analytics:** Augmented analytics uses AI and ML to enhance traditional analytics processes, automatically identifying insights, trends and patterns in data without requiring manual intervention. By combining data discovery, predictive analytics and NLP, augmented analytics helps organizations derive actionable insights faster and more effectively.
- **Continued shift toward embedded analytics:** This trend is gaining traction as organizations seek to make data-driven insights an inherent part of everyday business processes rather than separate, standalone tasks. By embedding analytics into applications, employees can make informed decisions within the context of their workflows without switching between disparate systems or tools.
- **Data mesh architecture:** Data mesh's architectural approach to decentralized data management shifts away from traditional monolithic data lakes and warehouses toward focusing on treating data as a product, with ownership distributed across various domains within an organization. Each domain is responsible for managing its data pipeline, including data quality, access and governance.
- **Operational data warehouse:** Operational data warehouse (ODW) integrates operational and analytical data to support real-time decision-making across business operations. As more organizations migrate to the cloud, the cloud-based ODW model is gaining popularity due to its ability to enable real-time analytics, improve operational efficiency and reduce the complexity of maintaining on-premises data infrastructure.
- **Real-time data warehousing and automation:** Real-time data warehousing enables enterprises to process and analyze data as it is generated, providing timely insights that can drive immediate decision-making. The combination of real-time data processing and automation allows organizations to streamline data workflows, reduce latency, and react faster to business needs.
- **Data warehouse as a service:** Data warehouse as a service (DWaaS) is an emerging cloud-based model where organizations can rent a fully managed data warehouse instead of building and maintaining their infrastructure. DWaaS eliminates the need for upfront capital investment in hardware and reduces the operational overhead of managing data storage and processing. This allows businesses to scale their data operations quickly and cost-effectively.

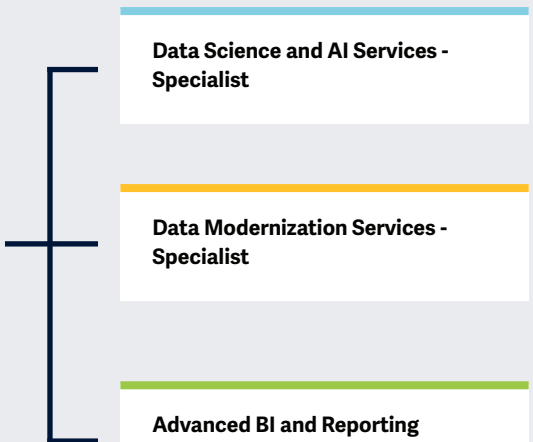
- **Metadata-driven architecture:** Metadata-driven architecture (MDA) refers to the use of metadata to manage, organize and optimize data processes across an organization. MDA enables better data discovery, lineage tracking and governance by providing a comprehensive view of data flows, transformations and relationships. This trend is increasingly important in the era of big data and AI as it helps organizations understand their data's context, quality and security.
- **Convergence of data lakes and data warehouses:** The convergence of data lakes and data warehouses is a growing trend in the data management space. Integrating these two models into a unified platform that can handle both structured and unstructured data enables enterprises to gain a more holistic view of their data assets.

The trends outlined above highlight the increasing sophistication of the data and AI landscape as organizations continue to embrace cloud technologies, AI-powered analytics and more flexible data architectures. These trends point to a future where data is more accessible, actionable and integrated into business operations, enabling organizations to unlock deeper insights and drive significant business value.

To stay ahead of the evolving needs of enterprises, service providers in the data analytics and AI market are enhancing their portfolios with cutting-edge solutions that focus on integrating AI with data science and BI capabilities. Enterprises recognizing the need for a solid data strategy and robust data foundations to fully leverage AI technologies have driven a significant shift toward data modernization. This realization is driving investments in data integration, cloud data platforms and modernization tools that can facilitate the seamless integration of AI-driven solutions. Service providers will continue to play a crucial role in helping enterprises navigate these trends by offering relevant tools, platforms and the expertise needed to manage, analyze and secure data in this rapidly evolving environment.

To thrive in today's data-driven landscape, enterprises must enhance data accessibility, scalability, and integration across systems. By leveraging AI-driven insights, adopting advanced governance frameworks, and optimizing real-time analytics, organizations can overcome operational challenges, unlock innovation, and make faster, more informed decisions that drive sustainable growth.

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



Simplified Illustration Source: ISG 2024

Definition

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

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

Enterprises are investing in advanced analytics and AI solutions to enhance operational and business performance, harnessing the true potential of data and driving informed decision-making. The shift toward augmented analytics expands the scope for data democratization, fostering a data-driven culture within enterprises, fueling innovation and agility, and empowering the workforce to deliver actionable insights. The surge in data volumes due to the increased adoption of cloud and IoT devices is fueling the need to modernize data infrastructure to meet heightened regulatory and compliance requirements. Modern data architectures have minimized the impact of data silos, promoting data lineage and governance and presenting opportunities for data democratization and monetization.

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

Scope of the Report

In this ISG Provider Lens™ quadrant study, ISG includes the following three quadrants: Data Science and AI Services - Specialist, Data Modernization Services - Specialist, Advanced BI and Reporting Modernization Services - Specialist

This ISG Provider Lens™ study offers IT-decision makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments
- Focus on U.S. market

This ISG Provider Lens™ study offers IT-decision makers: Our study serves as the basis for important decision-making in terms of positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing provider.

Provider Classifications

The provider position reflects the suitability of providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the service requirements from enterprise customers differ and the spectrum of providers operating in the local market is sufficiently wide, a further differentiation of the providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between $20 million and $999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above $1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star.

- **Number of providers in each quadrant:** ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Sweet Spot

66degrees

Overview

66degrees, headquartered in Illinois, U.S., helps shape the future of work at the intersection of cloud, data and AI technologies. The company transforms customer experiences, optimizes operations and unlocks business value through strategic and innovative solutions. With a vision for an AI-driven future, 66degrees helps organizations achieve their goals with speed, agility and confidence.

Key Provider Capabilities

- **Comprehensive and versatile portfolio:** 66degrees offers an extensive services portfolio, including AI readiness assessments, innovation workshops and rapid proofs of concept (PoCs), that covers the entire spectrum of AI and data modernization, from strategy development to long-term managed services. Each client engagement is tailored to meet industry-specific needs, starting with a complimentary discovery session to identify potential ROI and align a customized solution architecture. Its data analytics modernization service guides clients through migrating to modern analytics platforms, and its embedded analytics service integrates powerful generative business intelligence (BI) analytics directly within existing applications.
- **Future-proof data modernization and governance:** 66degrees emphasizes the importance of a future-proof data foundation through tailored data strategy services. The company ensures robust data governance and alignment with AI and ML and AgenticAI initiatives by engaging in collaborative assessments, developing strategic road maps and designing secure and scalable data architectures. Its data warehouse modernization services further empower organizations to leverage their data effectively, respond to changing business needs and achieve faster deployment of AI and ML models compared with legacy systems.
- **AI-driven insights and experience design:** 66degrees specializes in modernizing data analytics and offering embedded analytics services that integrate powerful insights directly within existing applications and workflows. Its experience design services combine data analytics, UX design and business strategy to create personalized and impactful experiences for customers and employees. This holistic approach drives measurable improvements in customer satisfaction, engagement and business outcomes, highlighting 66degrees' commitment to optimizing digital touchpoints and journeys.

Benefits Delivered

- **Enhanced customer profiles with increased click rates that surged by 57 percent from baseline due to personalized recommendations as well as streamlined insights and optimized campaigns**
- **Risk identification, enhanced analytics, scalability, improved user experience, enhanced data insights, improved decision-making and future-proof data foundation**

66degrees

Sweet Spot

- **Comprehensive data-driven approach:** 66degrees is committed to helping organizations harness the power of data through secure, scalable and innovative solutions. Its unified data platform underpins this approach, enabling businesses to consolidate diverse data sources with AI-powered data supply chains while ensuring robust data governance, security and compliance. This platform is the foundation for advanced AI and analytics initiatives, allowing clients to confidently expand their use of cutting-edge technologies. Its focus on medallion architecture and modern integration patterns reduces technical debt and enhances data portability.
- **Democratizing GenAI and streamlining with AIOps and MLOps:** 66degrees integrates generative AI (GenAI) and large language models into its analytics deployments to promote self-service capabilities and foster a data-driven culture. It enables accessibility to these technologies across all organizational levels, breaking down AI adoption barriers and empowering users to make informed decisions with intuitive tools. Integrating AIOps and MLOps into its data platform as a first-class service facilitates streamlined model development, deployment and maintenance, enabling continuous value delivery while optimizing resources.
- **Tailored and full lifecycle AI capabilities:** 66degrees caters to clients at various stages of their AI journey, providing tailored guidance to identify high-impact opportunities and drive measurable business value. It prioritizes business integration, empowering clients to enhance performance and transition from traditional systems to innovative AI-driven solutions. Proprietary tools like Hub66 ensure consistent quality, efficiency and customization across engagements. The 66Way methodology blends agile flexibility with clear scopes, timelines and budgets, facilitating successful project delivery and long-term client success through hypercare or managed services offerings.

Future roadmap

66degrees is poised for continued growth in the advanced analytics market over the next 12 months, focusing on the following initiatives:

Continuing its investment and growth in GenAI and AgenticAI delivery accelerators across professional services and managed services portfolios

Focusing on the extensibility of the platform's GenAI capabilities to introduce structured data analysis capabilities into custom tools or workflows powered by strong semantic layers and security integrations already built within its client's analytics platforms

Enhancing partnership tiers through certifications and investing in expanding offerings and IP assets to accelerate key industries and horizontal markets

Appendix

Methodology & Team

The ISG Provider Lens 2024 – Advanced Analytics and AI Services research study analyzes the relevant software vendors/service providers in the U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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The research and analysis presented in this study will include data from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with service providers and analysis of publicly available market information from multiple sources. ISG recognizes the time lapse and possible market developments between research and publishing, in terms of mergers and acquisitions, and acknowledges that those changes will not reflect in the reports for this study.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Advanced Analytics and AI Services market
2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities & use cases
4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)
5. Use of Star of Excellence CX-Data
6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.
7. Use of the following key evaluation criteria:
   * Strategy & vision
   * Tech Innovation
   * Brand awareness and presence in the market
   * Sales and partner landscape
   * Breadth and depth of portfolio of services offered
   * CX and Recommendation

Lead Analyst

Gowtham Kumar Sampath
Assistant Director and Principal Analyst

Gowtham Sampath is an Assistant Director and Principal Analyst with ISG Research responsible for authoring ISG Provider Lens™ quadrant reports for Banking Technology/Platforms, Digital Banking Services, Cybersecurity and Analytics Solutions & Services market. With 15 years of market research experience, Gowtham works on analyzing and bridging the gap between data analytics providers and businesses, addressing market opportunities and best practices. In his role, he works with advisors in addressing enterprise clients' requests for ad-hoc research requirements within the IT services sector, across industries.

Furthermore, he authors thought leadership research, whitepapers, articles on emerging technologies within the banking sector in the areas of automation, DX and UX experience as well as the impact of data analytics across different industry verticals.

Research Analyst

Saravanan M S
Research Specialist

Saravanan M S is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on Analytics Services and Platforms. In this role, he aids the lead analysts in the research process and is the author of the global summary report. He also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments.

Saravanan has six years of experience and expertise in technology, business and market research and has been associated with technology research firms specializing in sales and talent strategies across industries. He has also spearheaded end-to-end research and consulting projects for global system integrators and enterprise clients.

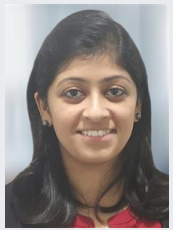
Research Analyst

Vartika Rai

Senior Research Analyst

Vartika Rai is a research analyst at ISG and is responsible for supporting and co-authoring Provider Lens™ studies on Analytics Services, and SAP Ecosystem. She supports the lead analysts in the research process and authors the global summary report. Vartika also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments. Vartika started her current role in June 2022. Before this role, she worked on secondary research, competitive intelligence, market trends, and newsletter analysis.

Study Sponsor



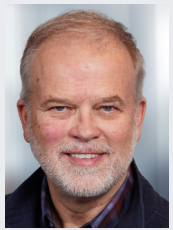
Namratha Dharshan

Chief Business Leader

Namratha brings over 19 years of market research experience, leading the ISG Provider Lens™ program focused on BPO and AI and Analytics. Namratha also leads the India Research team and is a speaker on ISG's flagship platform, the ISG Index. She leads the ISG Provider Lens BPO charter that includes coverage on AI, GenAI and analytics. The program includes more than 20 different reports. She is also responsible for delivering research on service provider intelligence. As part of her role, she heads a team of analysts and manages the delivery of research reports for the Provider Lens™ program.

She is principal analyst and is responsible for authoring thought leadership papers and service provider intelligence report in the areas of BPO focused on customer experience and contact center services. She has also authored other horizontal service line reports like finance and accounting and vertical focused reports for insurance. She is also part of Senior Leadership Council for India Research and represents a team of over 100 research professionals.

IPL Product Owner



Jan Erik Aase

Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a partner and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

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