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The Gartner BI, PM and IM Services Vendor Guide

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Selecting a business intelligence (BI), performance management (PM) or information management (IM) service provider is challenging, because many suppliers claim to compete in these markets, and buyers often lack the resources or time to scan the market for relevant options in their geographical area.

The use of BI and PM is increasing as organizations realize how the use of information furthers their business and enables them to operate more competitively in the market. These projects are no longer simple technology implementations involving a single organizational department but are becoming more complex, involving whole organizations, numerous business processes and people. These initiatives also require different skills and capabilities, such as business process modeling and design. The most-successful deployments are in organizations where both business and IT are actively involved. In line with this development the need for external service providers (ESPs) to implement these solutions is growing, as clients frequently lack the internal staff needed to successfully plan and implement BI and PM. But be aware of a shortage of these skills in the external market; you may need to also invest in and develop internal staff expertise, especially where specific domain knowledge is required.

The serious worldwide economic downturn that began in 2H08 has had an impact on the consulting and system integration (C&SI) markets. This market worsened in 2009, and Gartner is forecasting the worldwide C&SI services market to decline 7.5% from previous growth of 9.1% in 2008. Despite this decline, areas of growth, such as BI, PM and IM solutions, still exist within the C&SI market. Clients have to prioritize more when deciding which BI, PM or IM projects they should progress, and there are delays and budget cuts in place, which means growth has slowed somewhat in 2009. Nevertheless, these initiatives tend to get higher priority within organizations. BI technologies were still at the top of the CIOs' agenda with the highest priority of all the new technologies when the new Gartner 2009 CIO survey was published earlier this year (see "Meeting the Challenge: The 2009 CIO Agenda"). In addition, BI, analytics and performance management was one of the fastest-growing (up 21.7%) enterprise software areas in 2008 (see "Market Share: Business Intelligence, Analytics and Performance Management Software, Worldwide, 2008"). Gartner's view is that leading organizations will develop a BI and PM strategy that will combine BI capabilities with a range of analytic applications to support a number of PM processes. Corporate performance management (CPM) is now an established market for packaged analytic applications, but other areas of performance management are also supported by analytic applications. These include HR, manufacturing, supply chain, procurement and CRM. Applications that support various aspects of PM have emerged during the past five to 10 years, and the breadth and maturity of offerings is increasing rapidly. This is because many vendors see PM as a growth opportunity as BI and business applications (such as ERP and CRM) become increasingly commoditized.

Gartner receives many client inquiries on the providers offering services in this market, ranging from large global providers to Pan-European providers, local providers or offshore providers. This guide can be used as part of a sourcing strategy to identify providers for a BI and PM initiative. When considering BI, PM or IM service providers, it is essential to recognize that the market is diverse with local differences. We have divided the report by a selection of providers in North America (including offshore-centric providers), Western Europe (defined by providers present in three areas or more) and Asia/Pacific. The report also lists offshore-centric providers present in Western Europe and software vendors offering services, as well as local providers in a selection of Western European regions.

The traditional large global providers are present in this report that have the size and scope to provide C&SI services across BI, PM and IM to large enterprises. There is also a selection of region-centric providers that also have large BI practices, but they focus on areas within the BI and PM framework, resulting in more-limited breadth of C&SI services. Offshore-delivery-centric providers have traditionally offered more-technical point solutions, but they are growing their practices strongly across countries and are starting to provide BI and PM solutions and business consulting. A large variety of small Tier 2 providers are focusing purely on the BI and PM space or are focusing on specific vertical markets or geographical territories. These regional providers fill an important gap by offering localized C&SI services.

Key Findings

The shifts in this market have not been dramatic over the past year but rather continue to develop over time with the key issues being:

- Scale — Global ESPs have the scale to deliver services across regions and domains; however, regional ESPs that are smaller and more flexible may provide equally good skills at a better value for projects that are more contained or of more-limited scope.
- Scope —ESPs working on global projects have the ability to offer broad C&SI services, making scope very important.
- Skills — Worldwide demand for high-level BI, PM and IM skills, especially in combination with business and industry knowledge, is increasing. It will be a challenge to staff projects that require associates with multiple competencies, because process-driven initiatives like BI, PM or IM require more than technology knowledge to succeed. There is a shortage of BI, PM and IM skills in the external market, so rates are high, and the right skills are difficult to secure.
- Stability — The fast-paced BI market lends itself to a higher level of consolidation than other IT services markets worldwide where acquisitions are common. It is critical to ensure the financial stability of an ESP to mitigate the risk of failing to complete a project.

- Strategy — Service providers are aggressively investing in their capabilities to provide full service across the application management life cycle to design, develop, install, host and manage processes and applications.

Recommendations

- The convergence of BI and PM will place greater pressure on organizations to buy software and services from larger providers, which isn't necessarily the right course of action. Business and IT need to balance tactical needs against strategic purchasing in a wider BI context.
- Get the people aspects right, because most factors for BI, PM and IM implementation success, don't relate just to technology. Ensure that business and IT are actively involved.
- Create a small team of internal BI, PM and IM specialists to define the right metrics for your agency and the regime to manage these. But these skills are in short supply and rates are high, so you may need to develop them in-house.

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1.0 Listings of ESPs

This guide lists service providers that have developed breadth and depth in their offerings to assist in BI, PM and IM, although the lists are not exhaustive. They do not represent a vendor rating, evaluation, or any form of competitive comparison. The sole intention is to use them as a reference guide for an initial listing of the service providers in each country or region. Recent published Gartner documents, such as Market Share, Forecast, MarketScope and Magic Quadrants, are reference points for the listings. Local inputs also were added by Gartner analysts who reside in that particular country or region.

2.0 C&SI Market

Providers of BI and PM services cover many different areas of clients' needs, from providing advisory services on strategy to creating a data warehouse (DW). The BI/PM services we are covering in this guide encompass the BI/PM framework model that includes:

- Information management infrastructure
- BI platforms and analytic applications
- Organization (people and process)
- Performance management
- Business strategy

This framework allows for placing the components of BI/PM into context of what is needed for a complete initiative in this space, as well as incorporating them into the larger business context, linking them to strategy execution (see Gartner's Business Intelligence and Performance Management Framework).

Some of these providers listed will be focused on one or more of these components, such as boutique consultants or management consultants, that primarily or exclusively work with clients to provide a strategy for their BI initiative but will not actually carry out the implementation for them. Others cover the whole framework from advisory services through to creating the DW and handling the internal change management and governance.

Therefore, it is important for clients to evaluate what they need help with and what their objectives are before engaging with or selecting a suitable service provider (see "Five Steps Required for a Successful BI Service Project" and "Findings: More Than 70% of BI and Performance Management Projects Are Delivered On-Site").

2.1 Information Management

IM is the broader discussion of not only technology but also the balancing technology choices with equally important organizational, governance, process and architecture dimensions to ensure an essentially, enterprisewide impact. This requires a holistic approach that Gartner has defined enterprise information management (EIM) as a program to organize, design and safeguard all information assets, including content found in databases, DWs, transaction systems, documents and digital media. EIM's objective is to address issues caused by decades of "silo based" system development, in which each application maintained its own version of data and process rules to suit local performance needs. EIM solves semantic inconsistencies and master data management issues, which have added significant costs and complexities to application integration and cross-functional initiatives. See "The Essential Building Blocks for Enterprise Information Management" for more information on these building blocks, which include vision, strategy, governance, organization, process, reference architecture and metrics. This broad structure makes it more difficult to define, formulate and communicate from the business to IT departments or from providers of services to organizations. Service providers focus on helping clients increase their ability to access, share and use timely information and offer different types of services under the heading of IM, such as defining enterprise IM processes, technologies, organization and architecture; improving process for IM, content management, data structure, master data and metadata management; reconciling data sources; and analyzing and improving data quality. IM is contextually sensitive as a solution and is driven by a collection of tools and approaches.

Enterprises have difficulty defining and communicating the value of IM. According to a recent Gartner survey, notable differences exist in how organizations refer to and use IM. This difference was evident among the different organizations but also between the business and the IT respondents of the survey. The term "IM" was frequently used by all, but the view of what the components of IM are, varied. For example, ERP, CRM, corporate performance management, governance, risk and compliance, and content management were sometimes considered to be a subsegment to IM by respondents, but not for all organizations. The IT roles focused on data warehousing, content management or competencies in general. The business focused on functional areas, such as strategic components and at the stage at which the data started to produce information they could use to add value to departments and the business (see "Dataquest Insight: What Business and IT Buyers Want From Information Management").

Enterprises are increasingly, at considerable rates, focusing on IM to achieve consistency of commonly shared business information for compliance, operational efficiency and competitive differentiation purposes. Organizations are dealing with much-greater amounts of information. They are becoming global and more transparent, and they are supporting new business models — all of which affect the interest and uptake in IM. IM is essential in many different areas, such as BI, business processes and data services, because IM becomes the platform that information can be exploited to full capacity.

Solution services for IM are offerings to design, develop and deploy enterprise processes and integrate related technology applications and platforms. These include business and infrastructure applications for IM, as defined in "Gartner's Business Intelligence and Performance Management Framework." These technologies and approaches enable the effective structure, management, leverage, quality improvement and governance of information that support strategic business initiatives and work toward a "single version of the truth." The types of services include defining enterprise IM processes, technologies, organization and architecture; improving process for IM, data structure, master data and metadata management; reconciling data sources; and analyzing and improving quality.

2.2 PM Overview and Strategic Approach

The emergence of PM has been driven by the need for organizations to lead, decide, measure, manage and optimize performance to achieve efficiency and financial benefit, rather than simply analyze past performance, which has been the focus of much of the past investment in BI. Gartner's view is that leading organizations will develop a BI and PM strategy that will combine BI capabilities with a range of analytic applications to support a number of PM processes.

PM is more than just a set of software tools and IT infrastructure. To be successful with PM, organizations need to support PM processes at multiple levels in an organization including task level and executive levels. CPM suites are used at the financial and senior level to support an enterprisewide view of current and prospective performance and provide business alignment with the organizations strategy. CPM is the most mature area of PM. It was a $1.87 billion global market in 2008 (see "Market Share: CPM Suites, Worldwide, 2008"), and has been one of the fastest-growing software markets tracked by Gartner.

CPM applications are used to measure and manage performance at the corporate and business-unit level — that is, they are used by the management team and senior executives to plan strategy, create financial budgets and plans for all levels of the organization, and measure corporate performance against strategic goals. CPM applications are generally sold in suites that cover a number of areas of well-defined functionality (see "Understanding CPM Applications"). CPM applications are a fundamental part of any organization's PM strategy, because they aggregate all performance reporting across the enterprise and provide an overall view of an organization's financial performance that stakeholders, regulators and markets will use to measure how well an organization has performed. Consequently, any vendor focusing on PM must have a strong strategy to deliver a suite of CPM applications, because without CPM any PM initiative will be fragmented and oriented around functional and departmental silos, with no consistent view of performance across the organization. Over the past year we have seen increased demand for a more-strategic approach, spearheaded by the CFO/CEO to implement a measurement system that can highlight overall performance (see "Dataquest Insight: Where the Finance Function Will Be Investing in the Next Two Years." CPM increasingly includes strategy management (including scorecards and metrics frameworks, strategic planning, initiative/goal management), which is usually tied to strategy maps or methodologies, such as the balanced scorecard or Six Sigma.

2.3 BI and DW

BI is used at Gartner as an umbrella term for the application infrastructure, platforms, tools best practices which enable the analysis of information to optimize decisions and manage performance. BI platforms and tools, data management, DW and data integration practices are included in this section of what ESPs are able use to help clients with in this space.

ESPs have existing capability to design, build and support the DW as a data repository. This is an integrated system that, along with data marts and operational data stores, makes it more complex than a simple archiving system. DWs, operational data stores and data marts are no longer only strategic analytic repositories; now, they have been incorporated into mission-critical systems. How to deal with the correct architecture, design and huge data volumes is a challenge for organizations. The DW team must have best practices to support data quality and enterprise IM strategies, as well as the mining and quality tools within the organization.

The BI competency center (BICC) for continuously improving the use of BI to meet business objectives is now a common best practice in many organizations. Because many organizations lack a complete inventory of needed skills, competencies or resources to plan, implement, manage and broadly deploy BI, they turn to ESPs to fill the gaps.

ESPs can, for example, assist with vendor selection, application development testing and support, report development and project/development management. Because most companies do not want to make a significant investment in building the requisite expertise, the demand for ESPs that offer services in this area is growing. Some of the different services that ESPs are offering clients in this space include custom DW implementation, Gartner and master data management assessments, extraction transformation and loading strategy, BI road map strategy, and information access and retrieval practices.

2.4 Analytics

Analytic applications, to an increasing degree, represent significant interest in the market and can be an opportunity for clients to be more competitive in a more-difficult marketplace. Analytic applications, whether packaged or custom-developed, analyze and process data to deliver the information users need to make better business decisions. These may be built using generic BI capabilities from a BI platform vendor or bought as a packaged solution developed by a specialist vendor.

The reporting capabilities of BI tools help users gain insight into data (for example, identifying which customers purchased which products), more-complex questions (such as which are the most-profitable customers) cannot be answered using only the BI platforms' reporting and analytical functions, because the underlying data must undergo complex business transformations to answer such questions.

Available packaged analytics can address a domain or task-specific analytical requirement, such as sales forecasting, fraudulent transaction alerting, market basket analysis or activity-based costing. Packaged analytics can help provide a true picture of customer profitability where the indirect costs of servicing a customer (marketing, selling, indirect support and more) is allocated directly to individual customers. Packaged analytics are sophisticated tools that handle mathematical calculations, data transformation and complex workflow to make this information available to organizations. CPM is another example of packaged analytics budgeting and forecasting applications supporting such processes as budget preparation and approval, budget revision and rolling forecasts.

The broad range of capabilities within applications and analytics goes from basic static reporting to sophisticated embedded analytics. Often, a mix is required to fulfill the correct requirements. There are, however, three main types of analytic application share common characteristics:

- Strategy-driven applications that are used mainly to measure and manage performance
- Analyst-driven applications that provide in-depth analysis and delivery of information (using a combination of capabilities, including ad hoc queries, online analytical processing [OLAP] cubes, data mining, statistics and dashboards/reporting and portals) across multiple information sources and/or processes to multiple user types on an ad hoc and/or schedule-driven basis
- Process-driven applications, which are primarily process-event-driven and provide operational managers and users insight at point of work

Service providers are offering their expertise in this area by developing and using analytic solutions that are functional and focusing on marketing, or industry-focused, such as supply chain, finance or analytics. Examples of analytic industry-specific solutions developed by service providers are demand forecasting and inventory analytics for the manufacturing sector, collection analytics for the banking sector or pricing analytics for the retail sector. The 2009 Gartner Hype Cycle for C&SI services includes some different analytics services offered by ESPs (see "Hype Cycle for Consulting and System Integration, 2009").

There is also a slowly developing trend for on-demand services in analytics, as organizations are focused on improving cost-effectiveness and shortening delivery timelines. Using on-demand services or software as a service (SaaS) provides clients with a much-less-expensive, one-off cost to start delivering a BI strategy, and offers an easier method of scaling back the investment if needed. Website analytics and CPM specific offerings have seen the most uptakes so far. These services are not of interest for the whole marketplace but the midmarket, in particular, is increasingly looking into SaaS because although they have similar requirements to integrate, report and analyze data from numerous systems, they don't have the internal staff or infrastructure to manage it themselves.

3.0 BI, PM and IM Service Providers by Region

3.1 North America

The U.S. market leads the world in adoption of BI and PM solutions. Organizations in North America have the largest penetration of CPM suite adoption than any other geographical locations. We expect the emphasis on optimizing existing investments and improving IT operational effectiveness to continue through 1H10, and BI and PM solutions provide the right foundation to support decision making based on evidence and analysis, rather than guesswork.

In late 2009 and into 2010, even amid recessionary spending, we expect the North American market for BI, and PM consulting and solution implementation services (the combination of C&SI services) to continue to grow, although at a slower rate than in recent years. With limited spending, enterprises will have their pick of firms to choose from for their downsized initiatives. This expected slowdown in the market will heighten competition and could extend already lengthening sales cycles even further. Compounding this slowdown is pressure in three key areas:

- Pricing pressure exists in BI and PM services, as it does broadly in IT services.
- Scope pressure appears to be another contributor to the reduction in spending, because enterprises are looking for ways to cut back; rather than attempt bigger, riskier projects, they appear focused on trimming back to more-modular, bite-size pieces of work that fit within revised budgets.
- Offshoring has become a business strategy for most Fortune 1000 companies. Gartner estimates that more than 70% of the Fortune 1000 companies are outsourcing part of their IT services. India is the hottest choice and is much bigger geographically than the other potential offshore locations in Brazil, Russia and China.

3.1.1 North American BI, PM and IM Service Providers

The following is a list of the North American BI, PM or IM service providers, with a particular focus on ESPs that are evaluated in Magic Quadrants, listed in Market Share reports or observed to be active in the market by Gartner:

- Adastra
- Accenture
- Archstone Consulting
- Aster Group
- Axis Group
- BI Source
- Breakaway Technologies
- Business & Decision
- Capgemini

- Captech
- Ciber
- Claraview (acquired by Teradata)
- Cognizant Technology Solutions
- Compact Solutions
- CSC
- Deloitte
- Edgewater Technology
- Ernst & Young
- Fair Isaac
- Fujitsu Consulting
- Genpact
- HCL Technologies
- Hexaware Technologies
- Hitachi Consulting
- HP (acquired EDS)
- IBM/Cognos
- Infosys
- Inmon Data Systems
- Ironside Group
- iStrategy
- KPIT Infosystems
- KPMG
- L&T Infotech
- Myers-Holum
- Niteo
- PA Consulting
- Palladium
- Patni Computer Systems
- PricewaterhouseCoopers

- RCG Information Technology
- The Revere Group
- Saama Technologies
- SandPoint Consulting
- Sapient
- Symmetry
- Tata Consultancy Services
- Unisys
- Wipro Technologies

3.2 Western Europe

The growth of the BI, PM and IM services market in Western Europe has been slowed by the economic downturn in 2008 and 2009. Several countries in Europe currently have negative gross domestic product (GDP) growth, and many organizations are cutting or delaying their planned IT expenditures. However, the BI, PM and IM services market is not as badly affected as other parts of the C&SI market, and we still see growth and continuing opportunities here, as clients use information with a more-process-focused strategic IM approach.

European market is fragmented and diverse and includes large global service providers, Pan-European providers, offshore providers, and small or very small local providers. The variety of providers is necessary to supply a broad client base ranging from large multinational organizations that need global support, Europe-based firms that are looking for a provider to handle a smaller, cost-centric project, or local clients that want to deal with a provider that is local and speaks their language.

The European market also differs by country. U.K. has one of the most-mature IT services markets in Europe, evidenced by the large presence of offshore providers and sophisticated buyers in the United Kingdom, which is becoming more process- and solution-driven, rather than just technology-centric. The Nordic region has high levels of penetration of BI platforms and tools in organizations, and with the ensuing need to manage this better is also moving toward more-strategic use of BI rather than point solutions. Germany and France have been more pragmatic in their use of BI and PM. Overall, enterprises in this region are slowly considering how their transactional information can become more strategically employed. As ESPs grow their presence or portfolio of offerings, understanding these distinctions becomes important in creating differentiation.

Gartner has observed some acquisition activity among providers that are offering BI C&SI services in Western Europe, which means that the provider landscape continues to change:

- HCL Technologies acquired Axon Global in December 2008, which will strengthen its capabilities in the U.K., as well as SAP.
- NTT Data acquired 72.9% of Cirquent from BMW, giving it access to the German IT services market. Cirquent will continue to operate independently with its own management and brand and will continue to offer services to BMW.
- Hitachi acquired U.K.-based Edenbrook in April, 2009 strengthening its U.K. presence and its Microsoft and Oracle capability.

- EMC acquired U.K.-based consultancy firm Conchango in April 2008.

3.2.1 Western European BI, PM and IM Service Providers

Having delivery capabilities in at least three major European markets is the requisite for the following list of Western European BI, PM or IM service providers. These providers are evaluated in Magic Quadrants, listed in Market Share reports or observed to be active in the market by Gartner:

- Accenture
- Altran
- Archstone Consulting
- Atos Origin
- BearingPoint
- Business & Decision
- Capgemini
- CGI
- Ciber
- CSC
- Deloitte
- Ernst & Young
- Fujitsu
- Getronics
- GFI Informatique
- Groupe Bull
- HP (acquired EDS)
- IBM/Cognos
- Indra
- Keyrus
- KPMG
- Logica
- PA Consulting
- Palladium
- PricewaterhouseCoopers
- SDG

- Siemens IT Services and Solutions
- Sopra
- Steria — Mummert Consulting
- T-Systems
- Unisys

3.2.2 Local Service Providers in Western Europe

We show a number of more-localized service providers, according to where they are headquartered. The lists represent Gartner's current assessment of country markets, and the lists are not exhaustive. They do not include every country and do not represent all providers.

3.2.2.1 France

The following represent a selection of vendors that are headquartered and predominantly operating in France:

- Aldecis
- Homsys
- Klee Performance
- Methys
- Micropole Univers
- Oresys
- SQLI
- Umanis

3.2.2.2 Germany

The following represent a selection of vendors headquartered and operating predominantly in Germany:

- Accelerate
- Business Code
- Caleo
- Cirquent
- Cundus
- Esprit Consulting
- LFB Group
- Information Bridge
- Intelligement

- Msg-Systeme
- Plaut
- Saracus
- Syskoplan
- Trivadis

3.2.2.3 United Kingdom

The following represent a selection of vendors that are headquartered and predominantly operating in the U.K.

- Acuma (Saksoft)
- Agile Solutions
- Amadeus
- Analitica
- Axon Global (acquired by HCL Technologies)
- Base3
- Paragon Consulting Group (see Note 1)
- Comset
- Conchango (acquired by EMC)
- Constructive Consulting
- Contemporary
- Edenbrook (acquired by Hitachi)
- ICIT
- Information Management Group (IMGroup)
- Management Solution Partners (MSP)
- Report Source
- RineData
- Rosetta Stone
- Thorogood

3.2.2.4 Denmark

The following represent a selection of vendors that are headquartered and predominantly operating in Denmark:

- BusinessMinds (acquired by PricewaterhouseCoopers)

- NNIT
- Platon

3.2.2.5 Finland

The following represents a selection of vendors that are headquartered and predominantly operating in Finland:

- Affecto
- Tieto (formerly TietoEnator)
- Visual Management

3.2.2.6 Norway

The following represents a selection of vendors that are headquartered and predominantly operating in Norway:

- EDB
- Ergogroup

3.2.2.7 Sweden

The following represents a selection of vendors that are headquartered and predominantly operating in Sweden:

- Acando
- Business Vision
- Capacent
- Connecta
- Guide (acquired by EDB)
- KnowIT
- Pointer
- Sigma

3.2.2.8 Netherlands

The following represents a selection of vendors that are headquartered and predominantly operating in the Netherlands:

- Centre Consulting
- BI4U
- CXVision
- Ensior
- Ordina

- Partake
- QNH
- Valid

3.2.2.9 Spain

The following vendors are headquartered and predominantly operating in Spain:

- Ibermatica
- Sineria

3.2.2.10 Italy

The following represents a selection of vendors that are headquartered and predominantly operating in Italy:

- Consoft Sistemi
- iConsulting
- Sineria

3.2.2.11 Switzerland

The following represents a selection of vendors that are headquartered and predominantly operating in Switzerland:

- Cambridge Technology Partners
- Stampa and Partners
- Synchrotech

3.2.2.12 Austria

The following vendor is headquartered and predominantly operating in Austria:

- Active Business Consulting

3.2.2.13 Belgium

The following represents a selection of vendors that are headquartered and predominantly operating in Belgium:

- Aexis Group
- Aprico Consultants
- iPerform

4.0 Offshore-Delivery-Centric Service Providers

The primary business focus of these providers is offshore services, in which the majority of the IT services are created offshore and then exported for client consumption in other markets. The global delivery is a central value proposition in their go-to-market strategy and presents a different engagement model. The U.K. has been the stronghold of these providers in Europe for cultural and historical reasons, but they are now also expanding into the rest of Europe, although the rate of growth and regional breadth varies among these providers. The following list shows a selection of offshore-delivery-centric service providers within some of the BI, PM or IM space:

- Cognizant Technology Solutions
- Genpact
- HCL Technologies
- Hexaware Technologies
- Infosys
- Mindtree
- Patni Computer Systems
- Satyam Computer Services
- Tata Consultancy Services
- Wipro Technologies

4.1 Asia/Pacific

Although Asia/Pacific is being affected by the global economic crisis to varying degrees, the outlook for BI remains positive. BI continues to be a high priority for CIOs, and they see BI a necessary investment to effectively manage their businesses during both prosperous and challenging times. Cost pressures are common among providers and end users, therefore, discounting, scaled-down projects and increased use of offshore delivery can be expected.

BI is often implemented as an extension of a core system, such as ERP, CRM, or supply chain management. Companies are becoming more sophisticated in understanding their business needs and are focused on implementing specific BI functionalities with targeted results. For example, regulatory guidelines have prompted banks to look into analytic solutions to assess customer risk levels and patterns in money-laundering activities. Governments, to efficiently drive policies for socioeconomic developments, need IM tools to manage their massive databases and turn them into meaningful data for analytical and reporting purposes.

Sufficient BI skills are lacking in Asia/Pacific, and a skills shortage can be a holdback for some enterprises. With strong demand in BI, especially in C&SI services, multinational providers will have a better leverage of resources from a wider global pool; however, the lack of resources in a physical location remains a major challenge because of constraints in culture, language and business practices.

4.2 Asia/Pacific BI, PM and IM Service Providers

The service providers with BI, PM or IM services that have a presence in multiple Asia/Pacific countries/regions are mostly the multinational service providers that offer similar services at the worldwide level. The service providers with a proven Pan-Asia/Pacific ability to deliver BI, PM and/or IM services are as follows:

- Accenture
- Altis Consulting

- Atos Origin
- Capgemini
- Deloitte
- Fujitsu
- HCL Technologies
- HP (acquired EDS)
- IBM Global Business Services
- LG CNS
- Logica
- NCR
- NCS
- Patni Computer Systems
- PricewaterhouseCoopers
- Siemens
- Tata Consultancy Services
- Unisys
- Wipro Technologies

Note: Service providers listed for the market and/or region are not exhaustive, and their offerings may change over time.

5.0 Software Product Companies

Software product companies can also provide clients with corresponding services when they buy and implement the software companies' products. These vendors have a service arm that can provide implementation services for their particular product to clients. We list some of the large software vendors in the BI, PM and IM space that have capabilities in many different regions. The following list includes providers that are evaluated in Magic Quadrants, listed in Market Share reports or observed to be active in the market by Gartner. (Note: This list is not divided into regions or countries, and while many of these providers operate globally, others do not.)

- Ab Initio
- Accelrys
- Acorn
- Actuate Software
- ARC
- Arcplan

- Autonomy
- BEA Systems
- Bitam
- Board
- Board International
- Clarity Systems
- Datawatch
- Dimensional Insight
- EMC
- Exact Software (acquired Longview)
- Fair Isaac
- IBM (acquired Cognos)
- Infor
- Informatica
- Information Builders
- Jaspersoft
- Kalido
- Lawson
- Lawson Software
- Microsoft
- MicroStrategy
- Minitab
- Oracle (acquired Hyperion)
- Panorama Software
- Qliktech
- SAP (acquired Business Objects)
- SAS Institute
- Siperian
- SPSS
- Tableau

- Tagetik
- Targit
- Teradata
- ThinkAnalytics
- Tibco Spotfire
- Visual Numerics
- Winterheller

Note: Service providers listed for the market and/or region are not exhaustive, and their offerings may change over time.

Note 1
Companies That Are Members of BPM International

- Paragon Consulting Group
- Centre Consulting
- IFB Group
- Capacent
- Valorgest

REGIONAL HEADQUARTERS

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