

Market Guide: External Service Providers for Master Data Management

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The use of ESPs is an effective tactic to accelerate MDM program success. MDM leaders should use this research to identify candidate providers based on their requirements by region, data domain, vertical sector, software solution and the size of the organization in scope.

Key Findings

- Based on numerous Gartner surveys and other client interactions, we estimate that more than 50% of master data management (MDM) programs use the services of one or more external service providers (ESPs) to accelerate their MDM strategies and (or) implementation. The use of ESPs for MDM can be effective in overcoming common barriers to implementation.
- Interactions with our clients, as well as briefings with and references supplied by software vendors indicate that when ESPs are engaged for MDM, the investment averages between two and three times the MDM software spend, with some large programs going even higher to between seven and ten times the software spend.
- Specialist MDM/ESP firms are more likely to concentrate on program strategy than implementation and larger ESP firms have more experience with implementation than strategy.

Recommendations

- Use the techniques described in "Best Practices in MDM: How to Evaluate and Engage External Service Providers" and "The Seven Building Blocks of MDM: A Framework for Success" to partition ESP work effectively and maintain control of the overall engagement.
- Evaluate and engage an ESP for MDM based on its experience in your vertical industry and required data domains. If direct industry experience is unavailable, consider adjacent industries.
- To avoid a software vendor's capabilities affecting your overall strategy, consider an ESP based on its vendor software implementation experience only if your MDM strategy is already complete, or you intend to use an MDM software solution based on other factors such as an enterprise-level software vendor relationship.

Table of Contents

Analysis.....	2
Introduction.....	2
Vendors.....	3
Capabilities Summaries.....	14
Gartner Recommended Reading.....	19

List of Figures

Figure 1. Region and Data Domain.....	15
Figure 2. Industry.....	16
Figure 3. Software Product (Part 1).....	17
Figure 4. Software Product (Part 2).....	18

Analysis

Introduction

The effective use of ESP firms in the strategy and implementation aspects of MDM programs can be sufficiently helpful in overcoming the common technical, organizational and political barriers to implementation — which can mean the difference between success and failure. More than half of clients, end-user survey respondents and event attendees Gartner interacts with in this area report using ESP firms with positive results, provided the engagement is managed properly from both client and ESP perspectives.

The vast majority of our interactions with MDM leaders in end-user organizations suggest that MDM ESPs spend averages of between double and triple what is spent on MDM software solutions, with very large enterprise business to consumer customer data implementations sometimes running between seven and ten times the software spend. A conservative aggregation of the various estimates we have compiled shows an estimated total market size of between \$3 billion and \$5 billion. Even at these rates of expenditure, most organizations report satisfaction regarding their ESP experience.

While the shortage of experienced resources (particularly on the strategy side) is often reported as a transient issue, ESP firms are typically able to rectify these issues to a client's satisfaction, indicating that the increase in the number of implementations is yielding a greater number of capable strategy and implementation professionals overall. One well-defined pattern emerging is that smaller firms tend to concentrate on MDM and governance strategy, while the larger firms are able to deploy a greater percentage of their resources to post-strategy implementation (see Note 1 for definitions of strategy and implementation).

Similarly to the MDM software market, the market for MDM and information governance consulting services is growing substantially from year to year and is far from mature. The more fluid aspects of MDM consulting firms and their engagements make this market quite challenging to qualify and segment.

These characteristics include, but are not limited to:

- Turnover of qualified resources.
- Rapid formation of alliances with software vendors.
- The continued use of stand-alone data quality and data integration tools to build customized MDM solutions.
- Subcontracting arrangements between and external to the roster included in this research.

This analysis was compiled using a dedicated survey of ESP firms that appear regularly in our interactions with clients, event attendees and software vendors, as well as in vendor briefings and other structured surveys of software vendor references and event attendees. Professional services teams resident within MDM software vendors and only supporting the implementation of that particular vendor's software, were not included.

The following vendors represent those that responded to the survey are specific to this research and representative of those in the market. The information we received through the survey was augmented where appropriate by publicly available information, such as vendors' websites and our interactions with Gartner clients. Due to the fluid nature of this market, no references were requested or contacted for this research and data points that are not publicly available could not be independently verified for accuracy. Due to the timing of the survey, the results submitted are considered to apply to the end of calendar year 2012.

Vendors

Affecto

Headquarters: Helsinki, Finland

Website: www.affecto.com

Engagement experience: 10% strategy — 90% implementation

Regions: EMEA

Top industries: Distribution/logistics, oil/gas/chemical process and resource manufacturing

Top data domains: Supplier, customer, other party, direct materials

Dedicated MDM full-time equivalents (FTEs): 30

Affecto is an enterprise information management (EIM) and business intelligence (BI) solutions provider concentrated in Northern Europe. It has implemented MDM solutions using Oracle's data relationship management (DRM), Microsoft's master data services (MDS), Informatica's MDM, and SAP NetWeaver MDM. Affecto also has formal partnerships with each of these software vendors and the majority of its MDM experience is with large enterprises. It has developed an MDM strategy management tool, as well as tools for data administration tasks.

BackOffice Associates

Headquarters: South Harwich, Massachusetts, U.S.

Website: www.boaweb.com

Engagement experience: 50% strategy — 50% implementation

Regions: North America and EMEA

Top industries: Life sciences manufacturing, oil/gas/chemical process and resource manufacturing, aerospace/defense and other manufacturing

Top data domains: Customer, direct materials, supplier, product (sell-side)

Dedicated MDM FTEs: 200

BackOffice Associates is an implementer of its proprietary ERP-centric data stewardship solutions, as well as SAP-specific Accelerator Paks enabled by SAP tools such as Information Steward, Data Services and Master Data Governance (MDG). The majority of the company's experience involves direct-to-SAP ERP data stewardship implementations, with the exception of its SAP Accelerator Paks, although BackOffice's solutions are vendor neutral. BackOffice has several software vendor partnerships, including SAP and Oracle. The majority of its experience is with large enterprises.

BearingPoint

Headquarters: Amsterdam, Netherlands

Website: www.bearingpoint.com

Engagement experience: 80% strategy — 20% implementation

Regions: EMEA

Top industries: Oil/gas/chemical process and resource manufacturing, public sector, distribution/logistics

Top data domains: Customer, direct materials, indirect materials maintenance repair and operations (MRO)

Dedicated MDM FTEs: 23

BearingPoint is an EMEA-based consulting firm with practices in several information management disciplines including MDM and information governance. It has partnerships with IBM, Oracle, Informatica and SAP. The company has MDM experience in Informatica MDM, Oracle, SAP, SAS, Talend and all of the IBM MDM software products with the exception of InfoSphere MDM Standard Edition. The entirety of its MDM experience is with large enterprises.

Business & Decision

Headquarters: Paris, France

Website: www.businessdecision.com

Engagement experience: 20% strategy – 80% implementation

Regions: EMEA

Top industries: Financial services, automotive manufacturing, life sciences manufacturing, retail

Top data domains: Product (sell-side), customer, other party

Dedicated MDM FTEs: 50

Business & Decision is a global system integrator (SI) with practices in most information management disciplines, as well as CRM/customer experience platform CXP, ERP and the life sciences systems validation process. The majority of the company's MDM experience is with large enterprises in EMEA. It has partnerships and experience with Informatica's MDM and product information management (PIM) (Heiler) products, IBM's InfoSphere Standard Edition, Oracle's DRM, Universal Customer Master (UCM) and Fusion Customer MDM, Orchestra Networks, SAS MDM, Talend and Tibco.

The majority of Business & Decision's experience is currently with Orchestra Networks, Oracle and Informatica. It has developed a financial MDM solution based on Orchestra Networks EBX and a data governance bootcamp for SAS, Informatica and IBM clients.

Cognizant Technology Solutions

Headquarters: Teaneck, New Jersey, U.S.

Website: www.cognizant.com

Engagement experience: 12% strategy – 88% implementation

Regions: North America, EMEA and Asia/Pacific

Top industries: Life sciences manufacturing, retail, financial services

Top data domains: Customer, other party, product, supplier

Dedicated MDM FTEs: 950

Cognizant's MDM practice is organized within its enterprise application services (EAS) division and the majority of its MDM experience is with large enterprises. It has formal alliances with Heiler, IBM, Informatica, Oracle, Orchestra Networks, Riversand, SAP (including Hybris), Talend and Tibco. The company has performed a substantial number of implementations in IBM Standard and Advanced Editions (as well as the latter's predecessor), IBM InfoSphere MDM for PIM and Informatica MDM.

Cognizant has developed industry-specific MDM solutions for life sciences, financial services, healthcare, and retail vertical sectors, as well as solutions for cloud-based MDM, social data integration with MDM and financial reference data management for multi-line of business enterprises. It has also developed accelerators for MDM assessment and road map development, business case development, data governance strategy, requirements analysis, data quality strategy, data stewardship UI development, MDM vendor software solution evaluation and MDM implementation testing. Cognizant also offers frameworks for data mapping and migration and templates for MDM design and development deliverables.

Datum

Headquarters: Annapolis, Maryland, U.S.

Website: www.datumstrategy.com

Engagement experience: 80% strategy — 20% implementation

Regions: North America, Latin America

Top industries: Industrial discrete manufacturing, consumer goods manufacturing, life sciences manufacturing, other manufacturing

Top data domains: Direct materials, indirect materials (MRO), customer, supplier

Dedicated MDM FTEs: 18

Datum is an EIM strategy firm with technology assets and methodologies in the information management discipline, with an emphasis on information governance. The majority of its experience is with large global manufacturing enterprises in North America. Datum has partnerships and significant experience with SAP and Winshuttle. The company has also developed a technology-neutral framework to document and track the business impact and value of information management programs.

Deloitte

Headquarters: New York, New York, U.S.

Website: www.deloitte.com

Engagement experience: 40% strategy — 60% implementation

Regions: North America, EMEA, Latin America, Asia/Pacific

Top industries: Financial services, public sector, retail, high-tech manufacturing

Top data domains: Customer, product (sell-side), supplier, direct materials

Dedicated MDM FTEs: 350

Deloitte is a global consulting and advisory firm that performs MDM and information governance engagements under the umbrella of its enterprise data management practice, within its broader IT services portfolio. The majority of Deloitte's MDM experience is with large enterprises, although it has also done some work with midsize and smaller organizations. The company has MDM partnerships with Oracle, SAP, IBM, Informatica, and Teradata, and substantial MDM implementation experience with Oracle (Fusion, UCM, Customer Data Hub [CDH]), Product Data Hub (PDH), SAP (Master Data Governance [MDG]/MDM), IBM Infosphere MDM, Informatica MDM, and SAS.

Deloitte has developed tools to prioritize the delivery of MDM solutions, which include a business value prioritization framework, MDM process models, MDM data models, as well as an enterprise data governance framework and operating model.

First San Francisco Partners

Headquarters: Oakland, California, U.S.

Website: firstsanfranciscopartners.com

Engagement experience: 90% strategy — 10% implementation

Regions: North America

Top industries: Financial services, high-tech manufacturing, life sciences manufacturing, industrial discrete manufacturing

Top data domains: Customer, other party, product (sell-side), supplier

Dedicated MDM FTEs: 3

First San Francisco Partners is a specialist strategy consulting firm concentrating on information management. The majority of its MDM experience is with large enterprises and it has partnerships with Collibra, Global Data Excellence, Informatica, Kalido, Oracle, Orchestra Networks, Riversand, Semarchy and Talend. First San Francisco Partners has experience with Informatica MDM, Oracle (PDH and Siebel UCM), Orchestra Networks, Riversand, Semarchy and Talend.

The company has developed proprietary methodologies for MDM and information governance assessment, strategy and agile-based implementation. It also offers a workshop designed to align an organization around shared goals for MDM and/or information governance.

HCL Technologies

Headquarters: Noida, India

Website: www.hcltech.com

Engagement experience: 35% strategy — 65% implementation

Regions: North America, EMEA, Asia/Pacific

Top industries: Financial services, consumer goods manufacturing, high-tech manufacturing, retail

Top data domains: Customer, product (sell-side), supplier, other party

Dedicated MDM FTEs: 450

HCL Technologies is a global system integrator with MDM and information governance practices housed within its larger set of information management offerings. The majority of its MDM experience is with large enterprises, although it has also done some work with midsize firms. HCL has partnerships and substantial implementation experience with all IBM MDM products, Informatica (both on-premises and cloud-based), Microsoft, Oracle, SAP and Tibco. It also has a partnership with SAS and has developed a data survivorship framework and testing productivity kit for use with Oracle Siebel UCM.

IBM Global Business Services

Headquarters: Armonk, New York, U.S.

Website: www.ibm.com

Engagement experience: 50% strategy — 50% implementation

Regions: North America, Latin America, Asia/Pacific, EMEA

Top industries: Financial services, retail, healthcare

Top data domains: Customer, contract, product (sell-side)

Dedicated MDM FTEs: 500

IBM Global Business Services is a global SI with an information management practice that includes MDM and information governance. The company has experience with all IBM InfoSphere MDM products, Informatica MDM (cloud and on-premises), all Oracle MDM products, all SAP MDM products and Tibco MDM. It has also developed MDM assets covering most domains and industries. These include estimation models, strategic road maps for information governance and data quality, data mapping, tool selection and consolidation and business interview guides, as well as use case testing and validation templates.

iGate

Headquarters: Fremont, California, U.S.

Website: www.igate.com

Engagement experience: 5% strategy — 95% implementation

Regions: North America, Asia/Pacific, EMEA

Top industries: Retail, distribution/logistics, consumer goods manufacturing, financial services

Top data domains: Customer, supplier, product (sell-side)

Dedicated MDM FTEs: 86

iGate is a global SI with MDM and Information governance practices housed within its larger set of BI and data warehousing offerings and the majority of its MDM experience is with large enterprises. iGate has partnerships and implementation experience with Informatica MDM, Oracle (Siebel UCM, Site Hub, Supplier Hub and DRM) and SAP (MDG-C and NetWeaver MDM). It has developed data modeling templates for the shipping industry (including vessels) and the customer data domain for the retail industry.

InforData Consulting

Headquarters: London, U.K.

Website: infordataconsulting.com

Engagement experience: 70% strategy — 30% implementation

Regions: EMEA

Top industries: Media/telecommunications, financial services, oil/gas/chemical process and resource manufacturing, consumer goods manufacturing

Top data domains: Customer, supplier

Dedicated MDM FTEs: 6

InforData Consulting is an EMEA-based specialist firm concentrating on information management, including MDM and information governance. The majority of its MDM experience is with smaller enterprises. It has also experience with Informatica MDM, SAP NetWeaver MDM, and Talend MDM. The company has developed a data governance charter template encompassing roles and responsibilities, processes and metrics.

InfoTrellis

Headquarters: Toronto, Ontario, Canada

Website: www.infotrellis.com

Engagement experience: 10% strategy — 90% implementation

Regions: North America, EMEA, Asia/Pacific

Top industries: Healthcare, retail, financial services

Top data domains: Customer, product, other party, asset

Dedicated MDM FTEs: 175

InfoTrellis is a specialist consulting firm concentrating on MDM. The majority of its experience is with large enterprises, although it has also done some work with midsize firms. It has partnerships with IBM, Software AG and Talend and has substantial experience in all of IBM's InfoSphere MDM products, including Reference Data Management (RDM). InfoTrellis has also developed an MDM implementation methodology, as well as products that monitor the ongoing quality of hub master data and perform mastering of big data sources.

L&T Infotech

Headquarters: Mumbai, India

Website: www.lntinfotech.com

Engagement experience: 60% strategy — 40% implementation

Regions: North America, EMEA

Top industries: Financial services, oil/gas/chemical process and resource manufacturing, life sciences manufacturing, other manufacturing

Top data domains: Customer, other party, direct materials, product (sell-side)

Dedicated MDM FTEs: 19

L&T Infotech is a global SI with an MDM practice housed within its larger BI and data warehouse offering. The majority of its experience is with large enterprises, although it has also worked with midsize firms. The company has partnerships and experience with Informatica MDM, Oracle CDH, PDH, Siebel UCM and Fusion MDM for customer and product, SAP NetWeaver MDM and Tibco MDM. L&T Infotech has developed a solution framework to provide data quality and stewardship functions for SAP NetWeaver MDM implementations and a technology-neutral MDM development framework.

LumenData

Headquarters: Santa Clara, California, U.S.

Website: www.lumendata.com

Engagement experience: 25% strategy — 75% implementation

Regions: North America, EMEA

Top industries: Retail, high-tech manufacturing, financial services

Top data domains: Customer, product (sell-side), supplier

Dedicated MDM FTEs: 45

LumenData is a specialist consulting firm with a concentration on MDM, data quality and data governance. The majority of its experience is with large enterprises, although it has also done some work with small and midsize firms. The company has partnerships with Informatica (including Heiler) and Oracle. It has experience with Oracle Siebel UCM, PDH, Fusion MDM for customer and Site Hub. LumenData has developed hub solutions based on Oracle for spend monitoring and higher education, as well as solutions to integrate Oracle Customer Hub with Oracle CRM On Demand and salesforce.com.

Stream Integration

Headquarters: New York, New York, and Ottawa, Canada

Website: www.streamintegration.com

Engagement experience: 25% strategy — 75% implementation

Regions: North America, EMEA

Top industries: Financial services, retail, high-tech manufacturing

Top data domains: Customer, product (sell-side), other party

Dedicated MDM FTEs: 15

Stream Integration is a specialist consulting firm with concentrating on information management, including MDM. The majority of its experience is with small and midsize firms, although it has also done some work with large enterprises. The company has a partnership with IBM and experience with all of IBM's InfoSphere MDM products, including RDM. Stream Integration has developed cloud offerings based on IBM's InfoSphere MDM Standard and Collaborative Editions and RDM. It also offers implementation accelerators for Collaborative Edition and RDM and an MDM health check for current implementations.

Tata Consultancy Services (TCS)

Headquarters: Mumbai, India

Website: www.tcs.com

Engagement experience: 15% strategy — 85% implementation

Regions: North America, EMEA, Asia/Pacific

Top industries: Financial services, retail, media/telecommunications

Top data domains: Customer, product (sell-side), supplier, asset

Dedicated MDM FTEs: 360

Tata Consultancy Services (TCS) is a global SI concentrating on information management (including MDM and information governance) under its BI and performance management practice. The majority of its experience is with large enterprises, although it has also done some work with small and midsize firms. TCS has partnerships with Agility, IBM, Informatica (including Heiler), Oracle, SAP (including Hybris), and Tibco.

The company has substantial experience with IBM InfoSphere MDM Advanced Edition and its predecessor, as well as IBM InfoSphere Server for PIM, Informatica MDM, Oracle PDH, Oracle Siebel UCM, and SAP NetWeaver MDM. It has some experience with IBM InfoSphere MDM Standard Edition, Oracle Supplier Hub, Oracle Site Hub, SAP MDG-C and MDG-M, Stibo and Tibco.

TCS has developed consulting frameworks for MDM around business case development, maturity assessment and solution evaluation and information governance. The company offers vertical-specific MDM assets for the telecommunications, retail, banking and oil and gas industries. TCS also has product-specific frameworks and templates for IBM, Informatica, Oracle, SAP, Stibo and Tibco.

Utopia Global

Headquarters: Mundelein, Illinois, U.S.

Website: www.utopiainc.com

Engagement experience: 60% strategy — 40% implementation

Regions: North America, Asia/Pacific, EMEA

Top industries: Consumer goods manufacturing, industrial discrete manufacturing, media/telecommunications

Top data domains: Direct materials, indirect materials (MRO), customer

Dedicated MDM FTEs: 40

Utopia Global is a specialist consulting firm concentrating on providing information management solutions in SAP environments. It has substantial experience with SAP MDG in customer, finance and materials domains, as well as SAP NetWeaver MDM. Under its partnership with SAP, Utopia Global has developed MDM assets for the automotive (supplier and material), consumer packaging (customer, material, finished product, regulatory compliance), chemicals (material, supplier customer), energy (material, financial, equipment, asset, material), life sciences (regulatory compliance) and transportation (asset) industries.

Virtusa

Headquarters: Westborough, Massachusetts, U.S.

Website: www.virtusa.com

Engagement experience: 15% strategy — 85% implementation

Regions: EMEA, North America

Top industries: Financial services, healthcare, media/telecommunications, other non-manufacturing

Top data domains: Customer, product (sell-side), other party, asset

Dedicated MDM FTEs: 150

Virtusa is a global SI with MDM and information governance offerings housed under its EIM practice. The majority of its MDM experience is with large enterprises, although it has done substantial work with midsize firms. Virtusa has implementation experience with all IBM InfoSphere MDM products, Informatica MDM, Oracle CDH and PDH and Talend MDM.

Virtusa has formal partnerships with IBM (Standard and Collaborative Editions), Oracle (PDH) and Talend. It has developed MDM and governance assets such as a design methodology to align stakeholders and accelerate business benefits, a modeling framework for customer data including pre-configured business rules and a toolkit for modeling complex product portfolios. The company has also developed assessment methodologies for MDM, information governance and data quality.

Wipro Technologies

Headquarters: Bangalore, India

Website: www.wipro.com

Engagement experience: 55% strategy — 45% implementation

Regions: North America, EMEA, Latin America

Top industries: Oil/gas/chemical process and resource manufacturing, high-tech manufacturing, financial services, life sciences manufacturing

Top data domains: Customer, supplier, direct materials, indirect materials (MRO)

Dedicated MDM FTEs: 790

Wipro Technologies is a global SI providing MDM and information governance solutions under its analytics and information management practice. The majority of its experience is with large enterprises. Wipro has partnerships and substantial experience with all IBM InfoSphere MDM products, Informatica MDM, cloud MDM, and PIM (Heiler), all Oracle MDM products, Orchestra Networks, all SAP MDM products (including Hybris), SAS MDM, Tibco MDM and Microsoft MDS.

The company has partnerships with Agility, InfoSphere RDM, Kalido MDM, Riversand, SAS MDM and Winshuttle. It has patents in MDM reference architecture and information management and has set up an MDM leadership council for its customers for sharing industry best practices and leveraging experiences.

Wipro has developed MDM assets for customer and product data for high-tech manufacturers, legal entities for financial services, product data for telecommunications, multidomain for retail, well data for oil and gas, industry-neutral solutions for reference data and the supplier data domain.

Wipro offers frameworks for MDM strategy and blueprinting, MDM tool evaluation, business case development, process analysis, information governance and managed MDM services (business process outsourcing). It has also created frameworks to facilitate MDM for big data and the cloud.

Capabilities Summaries

Figure 1. Region and Data Domain

Company Name	Region				Domain							
	North America	EMEA	Asia/Pacific	Latin America	Customer/Consumer	Other Party	Product (Sell-Side)	Direct Materials	Indirect Materials (MRO)	Supplier	Asset	Other
Affecto												
Backoffice Associates												
Bearing Point												
Business & Decision												
Cognizant Technology Solutions												
Datum												
Deloitte												
First San Francisco Partners												
HCL												
IBM Global Business Services												
iGate Corporation												
InforData Consulting												
InfoTrellis												
L&T Infotech												
LumenData												
Stream Integration												
Tata Consultancy Services												
Utopia Global												
Virtusa Corporation												
Wipro Technologies												

Blue = regional experience; Green = data domain experience
MRO = maintenance, repair and operations

Source: Gartner (December 2013)

Figure 2. Industry

Company Name	Industry															
	Manufacturing								Non-manufacturing							
	Oil and Gas, Chemicals, Process and Resource Industries	Automotive	Aerospace and Defense	Industrial Discrete	High Tech	Life Sciences	Consumer Goods	Other Manufacturing	Healthcare	Financial Services (including Insurance)	Distribution and Logistics	Retail Trade	Media and Telecommunications	Power Generation and Utilities	Public Sector	Other Non-Manufacturing
Affecto																
Backoffice Associates																
Bearing Point																
Business & Decision																
Cognizant Technology Solutions																
Datum																
Deloitte																
First San Francisco Partners																
HCL Technologies																
IBM Global Business Services																
iGate Corporation																
InforData Consulting																
InfoTrellis																
L&T Infotech																
LumenData																
Stream Integration																
Tata Consultancy Services																
Utopia Global																
Virtusa Corporation																
Wipro Technologies																

Blue = industry experience; Green = industry experience

Source: Gartner (December 2013)

Figure 3. Software Product (Part 1)

Company Name	Product																		
	Agility (Pindar)	Enterworks	Heiler	Hybris	IBM InfoSphere MDM Advanced Edition	IBM InfoSphere MDM Collaborative Edition	IBM InfoSphere MDM Enterprise Edition	IBM InfoSphere MDM Standard Edition	IBM InfoSphere RDM	IBM InfoSphere MDM Server	IBM InfoSphere MDM for PIM	Informatica Cloud MDM (Data Scout)	Informatica MDM (Non-Data Scout)	Kalido	Microsoft MDS	Oracle (CDH)	Oracle (PDH)	Oracle (Siebel UCM)	Oracle Fusion MDM for Customer
Affecto																			
Backoffice Associates																			
Bearing Point																			
Business & Decision																			
Cognizant Technology Solutions																			
Datum																			
Deloitte																			
First San Francisco Partners																			
HCL Technologies																			
IBM Global Business Services																			
iGate Corporation																			
InforData Consulting																			
InfoTrellis																			
L&T Infotech																			
LumenData																			
Stream Integration																			
Tata Consultancy Services																			
Utopia Global																			
Virtusa Corporation																			
Wipro Technologies																			

Blue = partnership and experience; Green = partnership only; Red = experience only

MDM = master data management; MDS = master data services; CDH = Customer Data Hub; PDH = Product Data Hub; UCM = Universal Customer Master

Source: Gartner (December 2013)

Figure 4. Software Product (Part 2)

Company Name	Product																		
	Oracle Fusion MDM for Product	Oracle Site Hub	Oracle Supplier Hub	Oracle DRM	Orchestra Networks	Riversand	SAP (MDG-C)	SAP (MDG-M)	SAP MDG-S	SAP MDG-F	SAP NetWeaver MDM	SAS DataFlux	Semarchy	Stibo Systems	Talend	Teradata	Tibco	VisionWare	Winshuttle
Affecto	Green			Blue			Green	Green			Blue								
Backoffice Associates	Green	Green	Green	Green			Blue	Blue	Green	Green	Blue								
Bearing Point	Red						Red	Red			Red	Red			Red			Red	Red
Business & Decision				Blue	Blue							Blue	Green		Blue			Blue	
Cognizant Technology Solutions	Green				Blue	Blue	Blue	Green	Blue		Blue				Blue			Blue	
Datum							Blue	Blue	Blue	Blue	Blue								Blue
Deloitte	Blue						Blue	Blue	Blue	Blue	Blue	Blue				Green	Red		
First San Francisco Partners				Green	Blue	Blue							Blue		Blue				
HCL Technologies	Blue			Blue			Blue	Blue			Blue	Green						Blue	
IBM Global Business Services	Red						Red	Red			Red							Red	
iGate Corporation		Blue	Blue	Blue			Blue				Blue								
InforData Consulting											Red			Red					
InfoTrellis																			
L&T Infotech	Green	Green	Green	Green			Green	Green	Green		Blue							Blue	
LumenData	Green	Blue																	
Stream Integration																			
Tata Consultancy Services	Green	Blue	Blue				Blue	Blue			Blue			Red				Blue	
Utopia Global							Blue	Blue	Blue	Blue									
Virtusa Corporation															Blue				
Wipro Technologies	Green	Blue	Blue	Blue	Blue	Green	Blue	Blue	Green	Green	Blue	Green						Blue	Green

Blue = partnership and experience; Green = partnership only; Red = experience only

Source: Gartner (December 2013)

Gartner Recommended Reading

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

"Best Practices in MDM: How to Evaluate and Engage External Service Providers"

"The Seven Building Blocks of MDM: A Framework for Success"

"Magic Quadrant for Master Data Management of Customer Data Solutions"

"Magic Quadrant for Master Data Management of Product Data Solutions"

"Why You Will Probably Need More Than One Master Data Management Vendor"

"Hype Cycle for Enterprise Information Management, 2013"

"Hype Cycle for Information Infrastructure, 2013"

Acronym Key and Glossary Terms

MDM	Master data management is a technology-enabled business discipline in which business and IT must work together to ensure the uniformity, accuracy, stewardship, semantic consistency and accountability of an enterprise's official, shared master data assets. The MDM software market is complex and largely characterized by specific segments focused on particular master data domains (for example, customer/party, product/thing, location/site or hierarchy).
Information Governance	The specification of decision rights and an accountability framework that ensure the appropriate behavior in the valuation, creation, storage, use, archival and deletion of information. It includes the processes, roles, standards and metrics that ensure the effective and efficient use of information to enable an organization to achieve its goals.

Evidence

A dedicated survey was transmitted to more than 40 ESP firms through regular Gartner interactions with clients, event attendees and software vendors, as well as in vendor briefings and other structured surveys of software vendor references (such as "Magic Quadrant for Master Data Management of Product Data Solutions") and Gartner Master Data Management Summit attendees.

The companies listed in this research represent the respondent base for this dedicated survey. The survey included data points in regard to revenue, dedicated and aligned FTE counts and experience by client enterprise revenue segment, vertical industry sector, geographic region, master data domain, and MDM software product (indicating formal alliances as appropriate).

Note 1 Data Point Definitions

For the purposes of this research:

Strategy is defined as services that assist clients in the formulation of business cases, road maps, business and technical metrics, governance organizations and processes, organizational change recommendations, information life cycle capture and planning, and technology selections that enable MDM to be implemented in their enterprises. These services correspond to the first six of Gartner's Seven Building Blocks of MDM, up to and including technology evaluation and selection. Therefore, a vendor claiming to concentrate on strategy may also report software experience. The vendors surveyed were asked to segment their practices using this definition, but it is possible that vendors did not strictly adhere to this convention.

Implementation is defined as services that assist clients in the installation, configuration and other tasks that are required for MDM software to be implemented in their enterprises (see "Market Definitions and Methodology: IT Services"). These ESP firms are engaged after all of the MDM strategy artifacts have been produced according to a recognized framework, such as Gartner's Seven Building Blocks of MDM and an MDM technology solution has been evaluated and selected. These services correspond to the seventh and last of Gartner's Seven Building Blocks of MDM. The vendors surveyed were asked to segment their practices using this definition, but it is possible that vendors did not strictly adhere to this convention.

Organizations are defined as follows:

- **Large** organizations are those with annual revenue above \$1 billion.
- **Midsized** organizations are those with annual revenue between \$250 million and \$1 billion.
- **Small** organizations are those with annual revenue below \$250 million.

Note 2 Examples of Survey Non-respondents

Examples of non-respondents include Accenture, CSC, Evaxyx, eVerge, HP, Infosys, and PwC. We will continue to contact non-respondents as updates to this research are published.

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