

The Forrester New Wave™: Computer Vision Consultancies, Q4 2020

The 13 Computer Vision Providers That Matter Most And How They Stack Up

by Kjell Carlsson, PhD

November 9, 2020

Why Read This Report

In Forrester's evaluation of the emerging market for computer vision (CV) consultancies, we identified the 13 most significant providers in the category — Accenture, Brillio, Capgemini, Deloitte, EPAM, Fractal Analytics, Grid Dynamics, Infosys, Insight Enterprises, Perficient, PwC, Quantiphi, and Wovenware — and evaluated them. This report details our findings about how well each vendor scored against 10 criteria and where they stand in relation to each other. AD&D pros as well as line-of-business and IT executives can use this review to select the right partner for their computer vision needs.

Key Takeaways

EPAM, Quantiphi, And Fractal Lead The Pack

Forrester's research uncovered a market in which EPAM, Quantiphi, and Fractal Analytics are Leaders; Capgemini, Deloitte, Wovenware, PwC, Infosys, Insight Enterprises, and Accenture are Strong Performers; and Grid Dynamics, Perficient, and Brillio are Contenders.

Model Development Experience, Data, And Vision Are Key Differentiators

Forrester found that extensive experience developing and operationalizing both 1) a comprehensive range of enterprise CV use cases and 2) unique technically challenging projects was a critical differentiator for Leaders in this market. Also key were capabilities for acquiring and augmenting CV training data as well as the vendor's strategy for ensuring the success and expansion of its CV offerings.

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November 9, 2020

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Drive Visionary Innovation With Computer Vision Consultancies

Computer vision (CV) consultancies help enterprises develop custom CV solutions for everything from drone-based predictive maintenance to document processing, and from social distance monitoring to medical imaging. These providers hail from all corners of the professional services landscape, but they all have the in-house CV experts to develop CV models from scratch (or customize pretrained CV models from third parties) as well as the services to execute the myriad other components of a successful CV solution or a broader CV strategy.

- › **CV consultancies see you through the full CV project lifecycle.** Most will help you identify and prioritize CV use cases; design the user experience; define requirements; acquire, annotate, and augment image and video training data; integrate CV models on specialized hardware; implement internet-of-things (IoT) platforms; develop end-user applications; and generally ensure you drive successful CV-fueled business outcomes. Many will help you do this rapidly, leveraging their prior experience on related projects, platforms with modular AI components, prebuilt accelerators for specific vertical or horizontal use cases, ecosystem of partners, and frameworks as far as the eye can see.
- › **Providers with experience and expertise relevant to your CV needs are harder to spot.** A plethora of providers are building CV capabilities, but determining the right consultancy for your CV strategy is challenging. There is no end in sight to the graveyard of CV proofs of concept that didn't make it into production. You must look beyond firms with broad but basic AI capabilities or large teams of generic data scientists and discern actual experience and technical expertise, not just in CV broadly but relevant to your particular CV solutions. For instance, expertise in document processing solutions is of limited help in developing models for satellite imagery, and experience with automated inspection solutions is hard to transfer to augmented reality solutions for field maintenance. Use this evaluation to see your way clear to the CV consulting firms that will best help you execute your specific CV vision.

Computer Vision Consultancies Evaluation Overview

The Forrester New Wave™ differs from our traditional Forrester Wave™. In the Forrester New Wave evaluation, we assess only emerging technologies, and we base our analysis on a 10-criterion survey and a 2-hour briefing with each evaluated vendor. We group the 10 criteria into current offering and strategy (see Figure 1). We also review market presence.

We included 13 vendors in this assessment: Accenture, Brillio, Capgemini, Deloitte, EPAM, Fractal Analytics, Grid Dynamics, Infosys, Insight Enterprises, Perficient, PwC, Quantiphi, and Wovenware (see Figure 2 and see Figure 3). Each of these vendors has:

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- › **Experience and a proven track record in computer vision.** Included companies must have deployed more than five CV projects, have more than five enterprise or government customers, and provided CV consulting services to customers for more than two years.
- › **In-house expertise.** Included companies must have more than five CV experts on staff who can develop custom CV models without relying on third-party CV capabilities.
- › **Revenue from computer vision projects.** Company must have at least \$1 million in revenue generated through bespoke CV consulting services and coming from a range of industry verticals.

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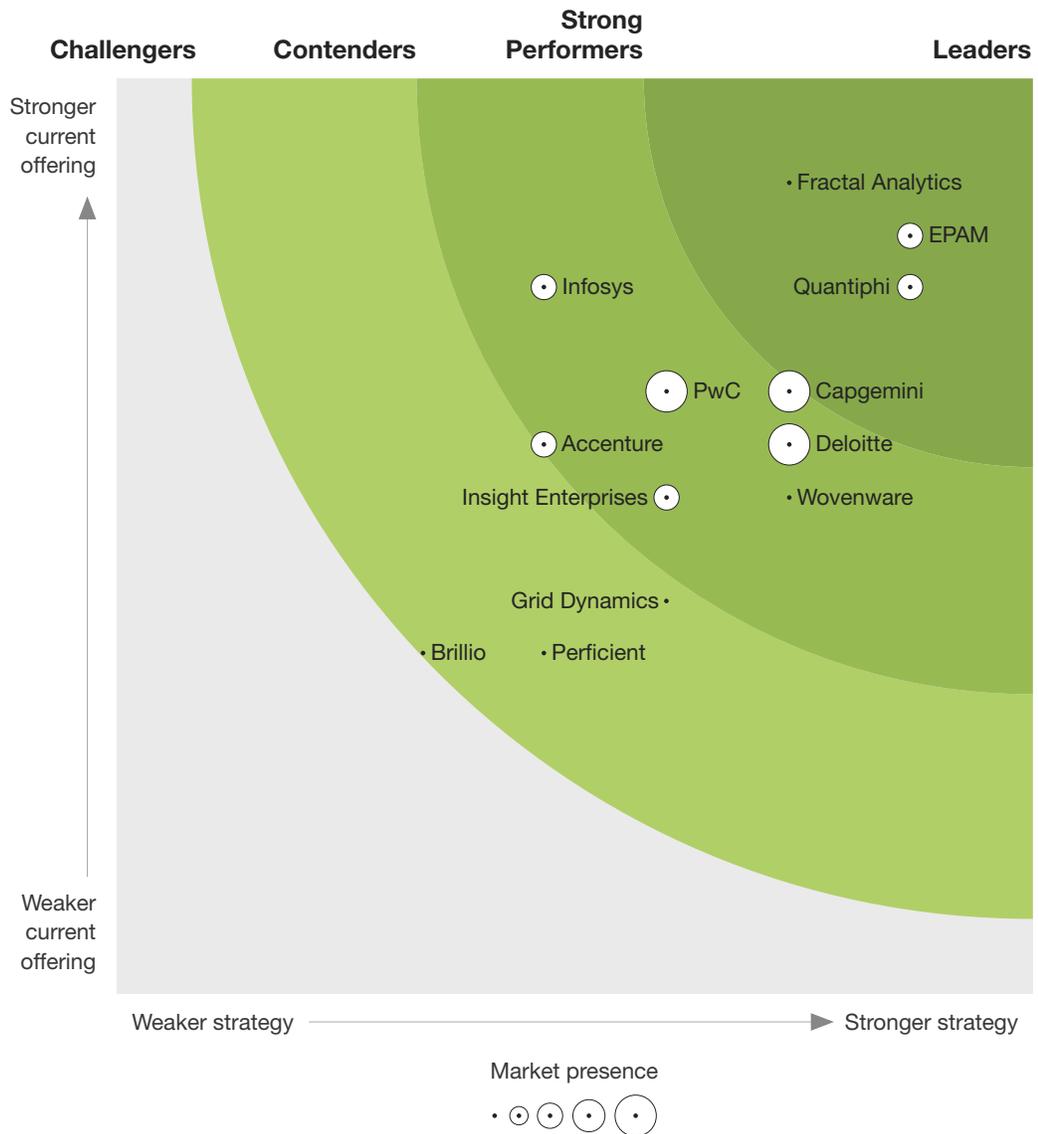
FIGURE 1 Assessment Criteria

Criteria	Platform evaluation details
Design and strategy	How does the vendor identify and prioritize high-value computer vision (CV) use cases and define and refine the strategy and project requirements? What outcomes and metrics determine effectiveness? How does the vendor educate clients about the latest opportunities and develop their strategy?
Data	How does the vendor source, acquire, label, annotate, augment, preprocess, synthesize, and/or accelerate or reduce the effort required to create training data for CV models? How does the vendor build production data pipelines for inferencing and scoring new data and ensure ongoing data quality?
Model development	How does the vendor create nonstandard, high-quality deep learning and/or traditional CV models? How does it build models from scratch? What differentiated pretrained models or other reusable assets can clients leverage? What is the breadth of CV models/use cases put into production by clients?
Hardware and deployment	How does the vendor tailor CV models for the hardware (camera, compute, and networking) requirements and/or advise on hardware alternatives for the customer's use case? How does the vendor create solutions for deploying, monitoring, and continuously improving CV pipelines across environments?
Solutions and accelerators	Which vertical and horizontal domains does the vendor serve? What accelerators or other prebuilt, reusable assets are available for CV use cases? What differentiating research or proprietary IP exists? How does the vendor assess and convey the trustworthiness and robustness of the solution?
Partners and integration	What is the vendor's external CV-related ecosystem, including hardware, data, services, solutions, and other partnerships? What are the top technology partners for CV projects? How do they integrate into existing customer ecosystems like services, APIs, search engines, data, and machine learning platforms?
Engagement success factors	How does the vendor measure the success of CV projects in terms of business impact? What are its capabilities for change management, project management, and alignment of different branches of a client's organization? What is the success rate of the vendor's CV engagements?
Vision	How well does the vendor's vision align with customer needs? How well does the vendor's vision align with current customer trends and future customer needs? How does the vendor track and invest in state-of-the-art CV technology? How does the vendor source, develop, and retain cutting-edge CV talent?
Roadmap	What is Forrester's level of confidence in the vendor's roadmap to increase adoption by enterprise buyers in terms of 1) planned product enhancements during the next 12 months and 2) whether the company has the resources and capabilities to deliver on its stated roadmap?
Market approach	Is the company executing a successful go-to-market approach?

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FIGURE 2 Forrester New Wave™: Computer Vision Consultancies, Q4 2020

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Computer Vision Consultancies
Q4 2020



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FIGURE 3 Vendor QuickCard Overview

Company	Design and strategy	Data	Model development	Hardware and deployment	Solutions and accelerators	Partners and integration	Engagement success	Vision	Roadmap	Market approach
EPAM	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Quantiphi	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Fractal Analytics	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Capgemini	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Deloitte	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Wovenware	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
PwC	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Infosys	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Insight Enterprises	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Accenture	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Grid Dynamics	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Perficient	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆
Brillio	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆	⬆

⬆ Differentiated
 ⬆ On par
 ⬆ Needs improvement

Vendor QuickCards

Forrester evaluated 13 vendors and ranked them against 10 criteria. Here's our take on each.

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EPAM: Forrester’s Take

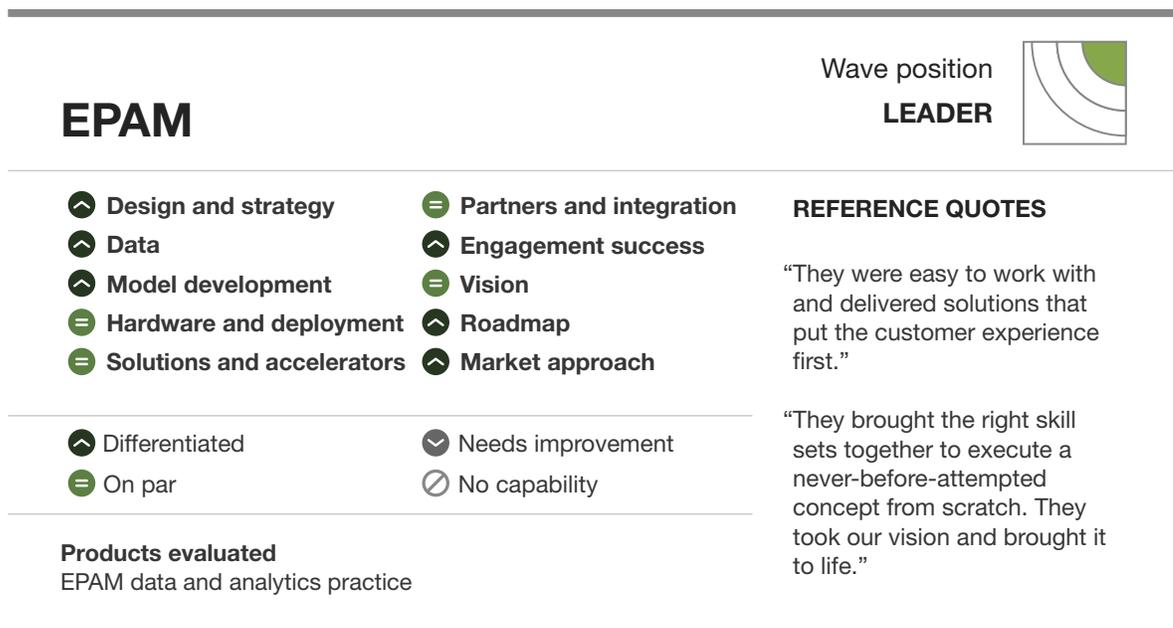
Our evaluation found that EPAM (see Figure 4):

- › **Delivers innovative CV solutions to innovative CV leaders.** Even tech giants with in-house CV experts turn to EPAM to deliver innovative CV solutions, and the company has a track record of delivering CV solutions that span the prosaic (e.g., asset tracking and invoice processing) to the extraordinary (e.g., CV-enabled augmented reality apps for field service).
- › **Could invest more in its CV accelerators.** Though it’s a bit like faulting Michelangelo for not making David easier to mass produce, EPAM would be able to scale CV projects across far more enterprises if it built more horizontal CV use case accelerators.
- › **Should be first on your list if you want a cutting-edge CV solution that really works.** Got innovation? EPAM has the design talent, CV expertise, and software engineering know-how to make it a reality.

EPAM Customer Reference Summary

Customers praised EPAM’s ability to execute frictionless cross-disciplinary projects, building never-before-seen CV solutions that were also technically excellent in production.

FIGURE 4 EPAM QuickCard



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Quantiphi: Forrester’s Take

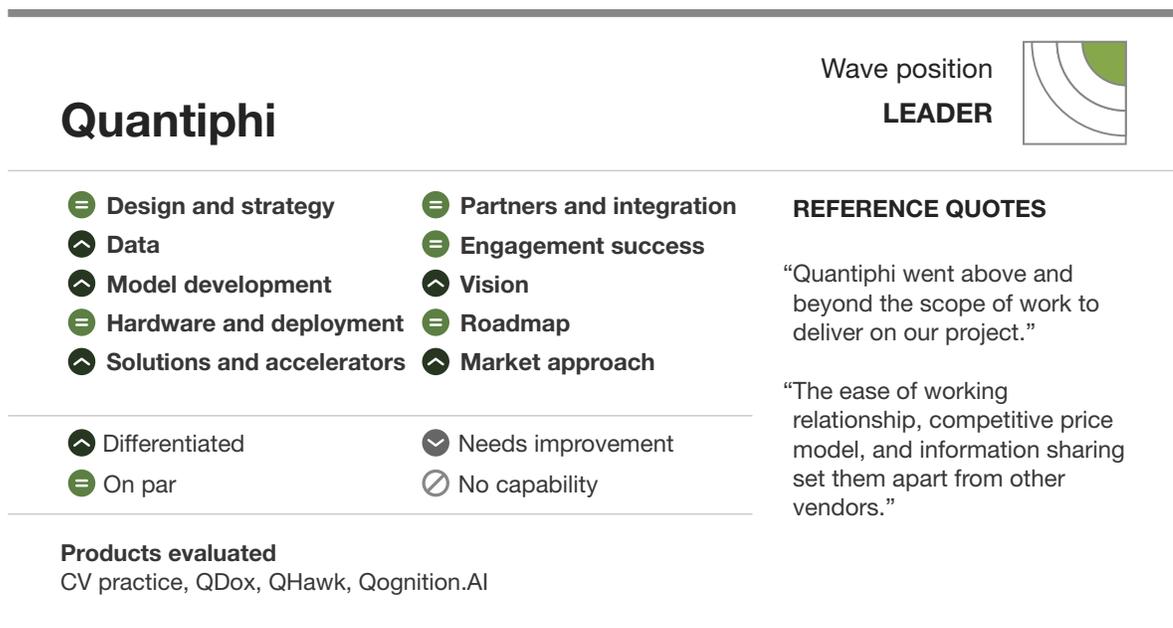
Our evaluation found that Quantiphi (see Figure 5):

- › **Tackles quantifiably more, and more challenging, CV use cases.** Quantiphi has tackled a wider and more difficult range of CV projects than any other vendor in this evaluation, including digital pathology, contract analysis, automated inspection, student proctoring, and social distancing monitoring. And it has more prebuilt CV and AI components and platforms than you can point a camera at.
- › **Could do with more partnerships. Is it a big deal?** No, but Quantiphi could extend its CV offerings even more with CV-related partnerships, especially when it comes to unconventional hardware and data.
- › **Is a go-to vendor for any real-world CV problem.** It’s a good bet that Quantiphi not only knows how to do it, it has done it (or something similar) before.

Quantiphi Customer Reference Summary

Customers praised Quantiphi for its expertise and transparency, as well as for overdelivering at competitive prices.

FIGURE 5 Quantiphi QuickCard



REFERENCE QUOTES

“Quantiphi went above and beyond the scope of work to deliver on our project.”

“The ease of working relationship, competitive price model, and information sharing set them apart from other vendors.”

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Fractal Analytics: Forrester’s Take

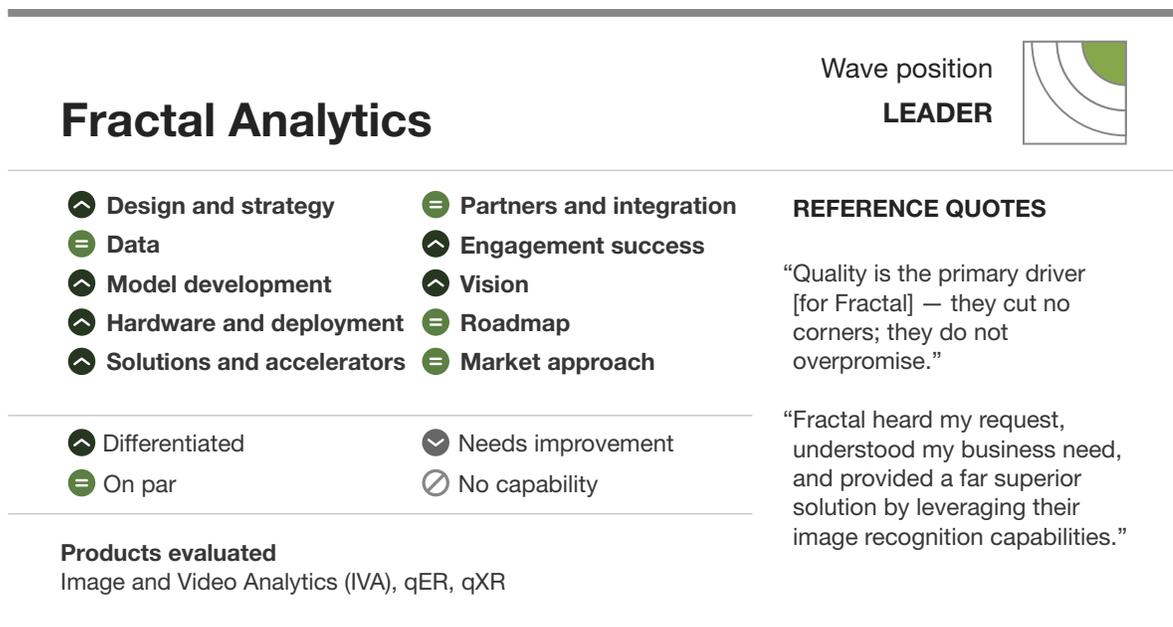
Our evaluation found that Fractal (see Figure 6):

- › **Knows CV because it has gone deep in medicine.** Fractal knows how to build technically demanding, customer-facing CV solutions, in part because it has built and productized its own medical imagery solutions, such as qER, an FDA-approved tool for identifying cranial anomalies in CT scans, and qXR, which analyzes roughly 20,000 patient X-rays per day.
- › **Could do with more partners and integration capabilities.** While Fractal has an extensive partner ecosystem for radiology, it has few CV-related partners otherwise.
- › **Is the best fit for medical imaging, CPG, and more.**¹ With its hard-earned healthcare know-how and extensive experience building CV solutions for retail (e.g., shelf analytics mobile apps and extracting pricing information from flyers), Fractal is a natural choice for these use cases but also many more, as the underlying CV capabilities transfer broadly.

Fractal Analytics Customer Reference Summary

Customers gave Fractal top marks across all its capabilities and highlighted its understanding of the business need, project management, and technical superiority, though they also wished there were more example applications.

FIGURE 6 Fractal Analytics QuickCard



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Capgemini: Forrester’s Take

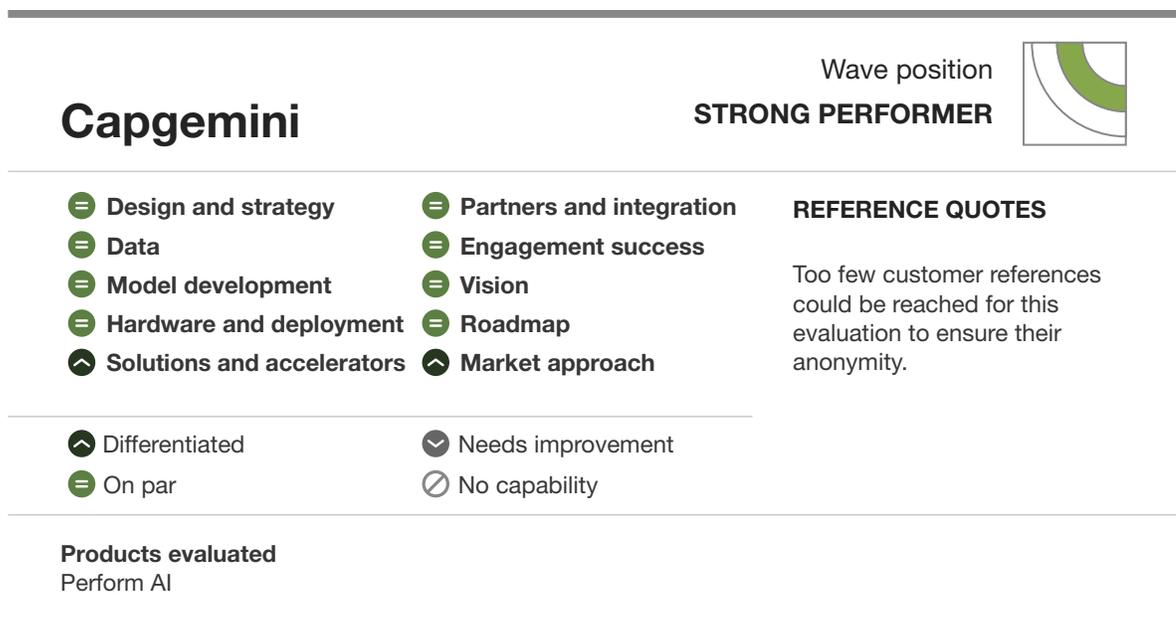
Our evaluation found that Capgemini (see Figure 7):

- › **Is serious about reusable CV solutions and accelerators.** Capgemini doesn’t have a platform for leveraging the AI knowledge gained on each project — it has two: an internal repository of successful AI solutions; and 890, which productizes the most successful use cases for Capgemini’s clients. Whether you’re monitoring social distancing or analyzing customs documents, you’ll be standing on the shoulders of other consultants.
- › **Could be driving more cutting-edge CV.** It may be a hairbreadth ahead of the largest consulting firms when it comes to CV, but Capgemini is more about implementing relatively mature CV use cases than extending the art of the possible with CV. Not bad if you have to choose, but the firm could do both.
- › **Is a good choice for tackling many low-hanging CV use cases.** Every organization has a plethora of fast time-to-value AI use cases, and Capgemini has more experience tackling more of them than the competition.

Capgemini Customer Reference Summary

Too few customer references could be reached for this evaluation to ensure their anonymity.

FIGURE 7 Capgemini QuickCard



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Deloitte: Forrester’s Take

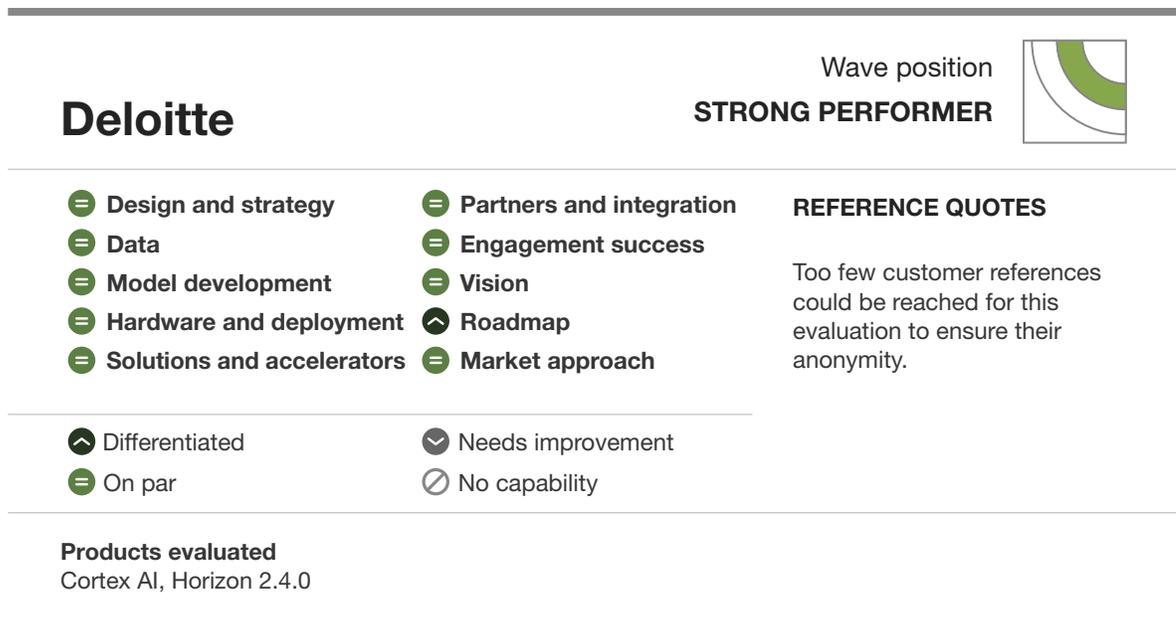
Our evaluation found that Deloitte (see Figure 8):

- › **Is building a platform to help you scale your production CV applications.** No joy if you can’t deploy (your CV models). Deloitte’s Cortex AI and Horizon platforms help organizations deploy, scale, and monitor the IoT-scale CV solutions that Deloitte can help you build.
- › **Needs to rethink trust for CV.** While Deloitte has a comprehensive framework for articulating your trust-related ideals when it comes to AI, it needs to do more work in establishing the actual methods and practices that would help clients achieve those goals.
- › **Is a good bet for your edge CV use cases.** Looking to deploy your models on tens of thousands of devices or locations? Deloitte has the experience and is building the platform that will help.

Deloitte Customer Reference Summary

Too few customer references could be reached for this evaluation to ensure their anonymity.

FIGURE 8 Deloitte QuickCard



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Wovenware: Forrester’s Take

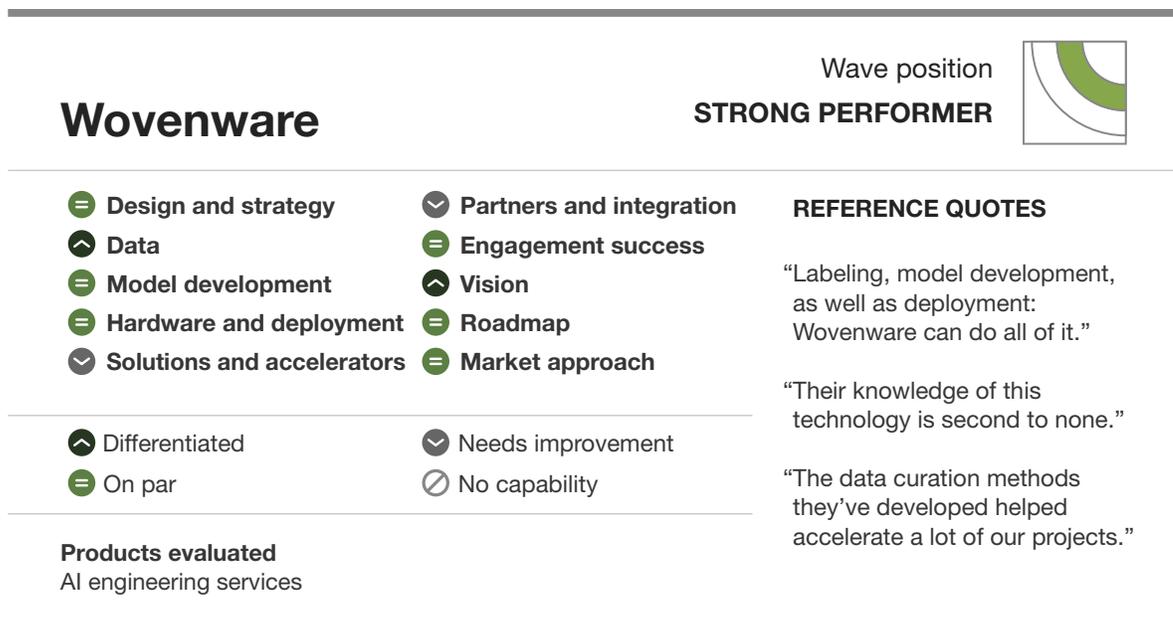
Our evaluation found that Wovenware (see Figure 9):

- › **Focuses on CV use cases that are out of this world.** Though Wovenware will tackle other CV use cases (e.g., mosquito larvae counting for public health projects), its specialty is developing CV models for satellite and aerial imagery, whether they be for identifying basketball courts or strategically important military hardware.
- › **Might not be able to support all your CV use cases.** Since it’s a tiny fraction of the size of most vendors in this evaluation, Wovenware might not, realistically, have the resources to support common, less-differentiated CV use cases, like document extraction.
- › **Is a good choice for government agencies and enterprises with sensitive data needs.** Wovenware is one of the few consultancies with a large, in-house, US-based (in Puerto Rico) data labeling team and has a history of clients with stringent security requirements.

Wovenware Customer Reference Summary

Wovenware had glowing recommendations that praised its support for the entire CV lifecycle, technical expertise, and professional execution. The only weak points were slightly less higher ratings for its hardware capabilities and partner ecosystem.

FIGURE 9 Wovenware QuickCard



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PwC: Forrester’s Take

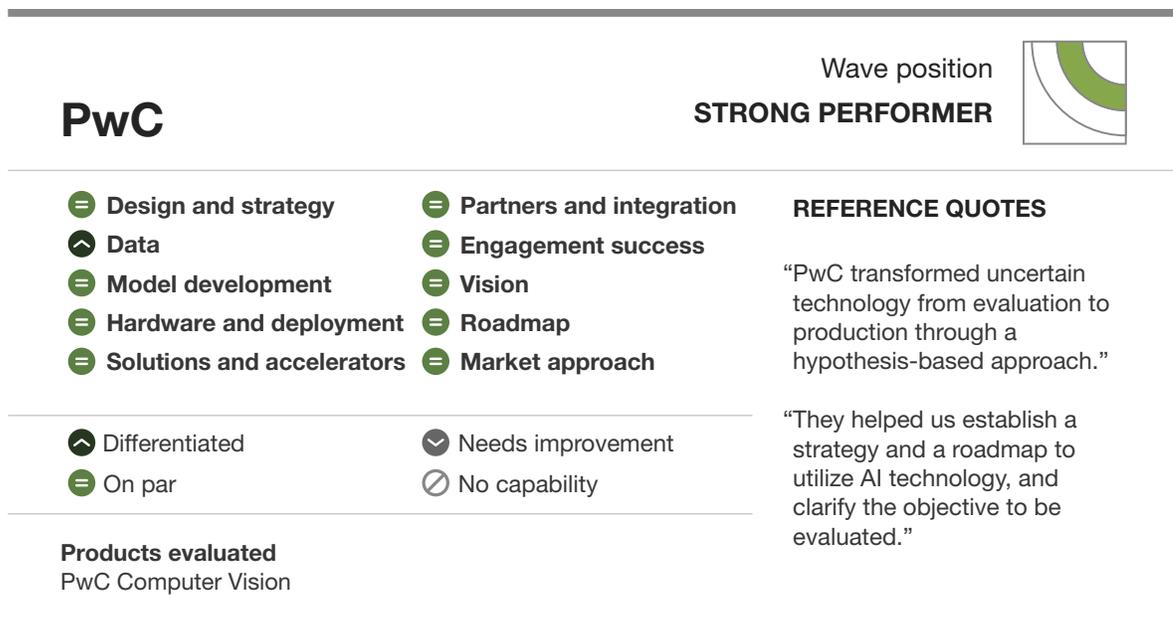
Our evaluation found that PwC (see Figure 10):

- › **Is particularly strong at document processing.** As you would expect from a Big Four audit firm, PwC is particularly strong at CV for document extraction and analysis use cases, such as loan fraud detection or e-discovery, but its CV capabilities extend further, to auto damage estimate and even personality analysis in job applicant videos.
- › **Needs more reusable CV assets.** While PwC’sers have access to a rich workbench of CV tools, PwC clients will want a CV platform that helps them rapidly develop and deploy a growing suite of CV solutions.
- › **Is a good choice for creating a virtuous CV cycle.** Come for the document extraction; stay for the drones. PwC can help you develop the diversified portfolio of CV projects with differing time-to-value and risk profiles that makes an AI transformation self-sustaining.

PWC Customer Reference Summary

Customers praised PwC for its expertise and ability to guide clients to leverage uncertain technology effectively, but they wanted more solution development capabilities and noted the occasional project management hiccup.

FIGURE 10 PwC QuickCard



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Infosys: Forrester’s Take

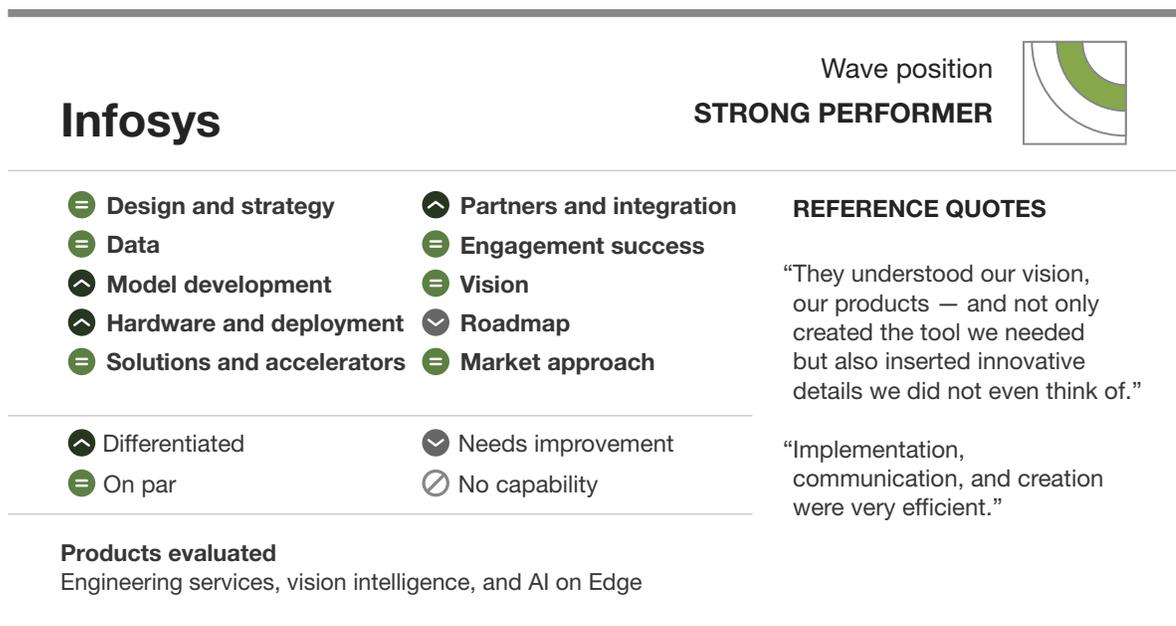
Our evaluation found that Infosys (see Figure 11):

- › **Has the most experience embedding CV in hardware solutions.** Infosys has exceptional CV and engineering talent, partner relationships, and project experience to support embedded CV solutions. And, though the vehicle is a golf cart, Infosys may well have developed the world’s first commercially available, fully autonomous passenger vehicle.
- › **Needs to build accelerators for more real-world enterprise use cases.** While impressive, most of Infosys’ flagship CV examples are innovation projects that do not tackle mainstream enterprise CV use cases or leverage reusable platform assets.
- › **Is a good fit for your robot and document processing needs.** Infosys surpasses others in its capabilities for the three D’s: “dull, dangerous, and dirty” CV use cases. Indirectly, it has strengths in a fourth D, documents, through its subsidiary EdgeVerve’s Nia platform.

Infosys Customer Reference Summary

Customers had superlative, albeit generic, praise for all aspects of Infosys’ CV capabilities and, at most, pointed to supporting more specialized AI hardware as an area for potential improvement.

FIGURE 11 Infosys QuickCard



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Insight Enterprises: Forrester’s Take

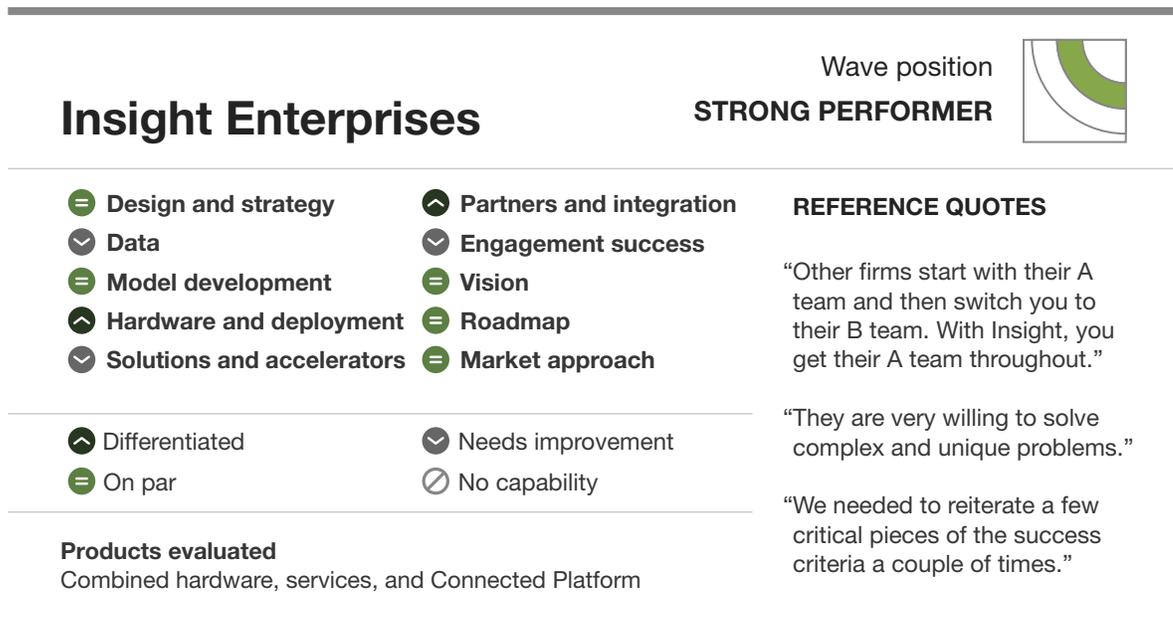
Our evaluation found that Insight Enterprises (see Figure 12):

- › **Is particularly good at deploying innovative CV solutions at the edge.** Looking to embed CV models for planes (drones for rapid inventory audits), trains (detecting misaligned tracks or missing spikes), or automobiles (tire health measurement)? Insight has the expertise in building CV pipelines that fit the hardware constraints and the IoT platforms to manage them.
- › **Needs to get more CV projects into production.** While Insight’s projects span a wide range of use cases, from equipment monitoring to document processing and augmented reality, too few have been operationalized.
- › **Is best fit for companies exploring edge CV solutions.** Insight is one of the few companies in this evaluation with the expertise to design and manage CV models deployed across mobile devices and vehicles, in settings with limited or no network connectivity.

Insight Enterprises Customer Reference Summary

Insight’s customer references were positive but mixed. They highlighted gaps, most notably in engagement success factors such as scope, success criteria, and costs.

FIGURE 12 Insight Enterprises QuickCard



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Accenture: Forrester’s Take

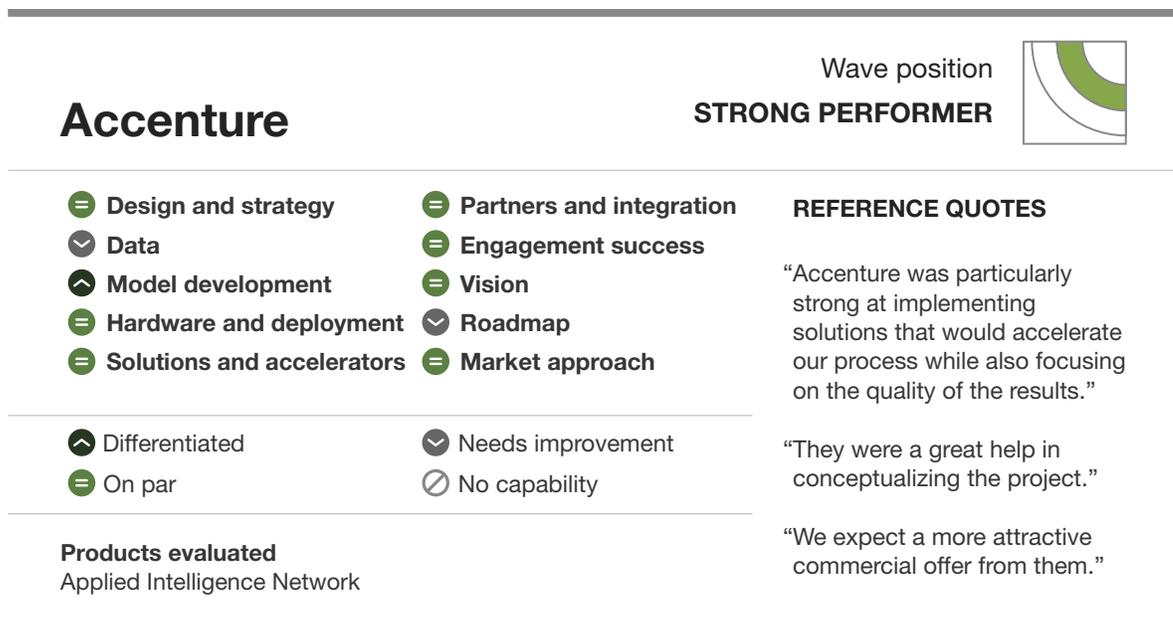
Our evaluation found that Accenture (see Figure 13):

- › **Is an old hand at CV.** Having executed over 100 CV projects, Accenture is most frequently cited by vendors as their top competitor, and it can point to a wide range of use cases, from document processing to vegetation management on power transmission lines.
- › **Needs to keep investing to stay relevant.** With few innovative use cases, even fewer examples in production, and some key gaps (notably in CV-related training data capabilities), Accenture needs to invest more in its CV offerings to stay on par with the other large consulting firms, let alone with smaller, more specialized ones.
- › **Is the best fit for companies already leveraging Accenture.** If Accenture is already helping you with your AI or digital transformation strategies, it’ll be quick, easy, and effective to get the firm to add common CV capabilities. Further, the firm is a good choice for adding CV use cases to existing Accenture-managed implementations.

Accenture Customer Reference Summary

Accenture’s customers had good things to say about the speed and quality of their CV projects but noted weakness in solutions and accelerators and wanted more cost-effective projects in the future.

FIGURE 13 Accenture QuickCard



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Grid Dynamics: Forrester's Take

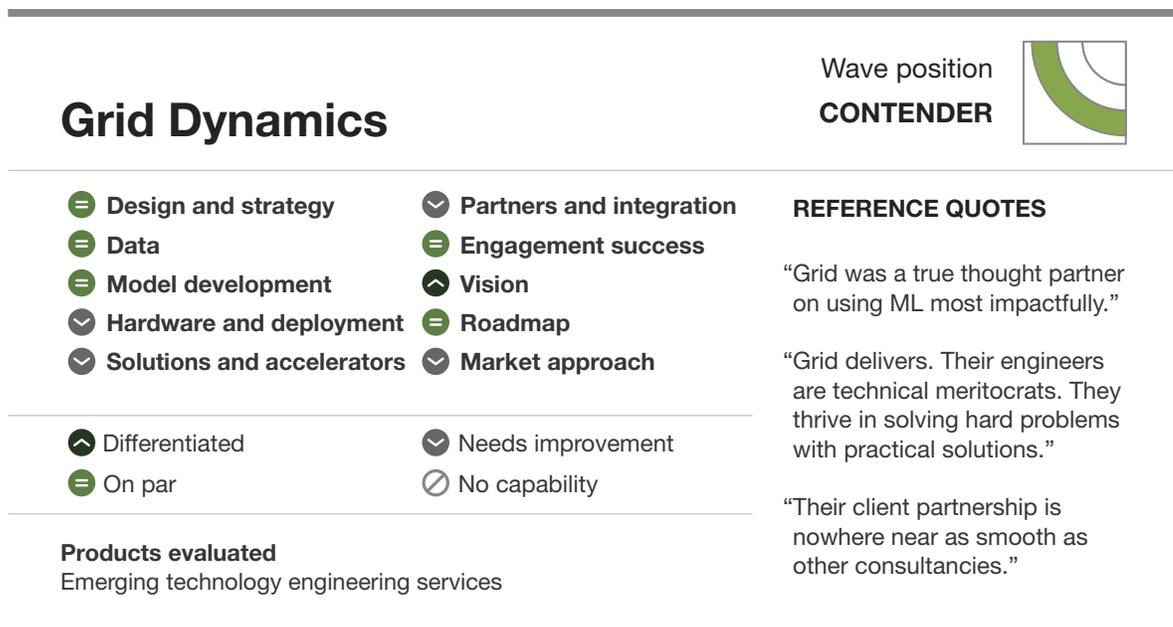
Our evaluation found that Grid Dynamics (see Figure 14):

- › **Is an expert at CV-assisted search.** If you found what you were looking for online at a large US retailer, there's a good chance you have Grid Dynamics to thank for it. Among vendors in this evaluation, Grid Dynamics has the most expertise leveraging the visual characteristics of products to improve search results and suggest related products.
- › **Has ways to go in broadening its CV capabilities.** While the company is investing in new areas, such as industrial label recognition, synthetic data using game engines, and virtual backgrounds, it has delivered few production CV projects outside of search.
- › **Is a no-brainer if you want to improve the performance of your e-commerce site.** If you aren't Amazon, you probably aren't optimizing your search results with visual data as effectively as you can, or even at all. Give Grid Dynamics a call.

Grid Dynamics Customer Reference Summary

Grid Dynamics received mixed customer reviews, with notably lower scores for design and strategy as well as solutions and accelerators. Customers praised its technical expertise and problem-solving skills but noted that Grid would be more successful with smoother client relationship management.

FIGURE 14 Grid Dynamics QuickCard



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Perficient: Forrester’s Take

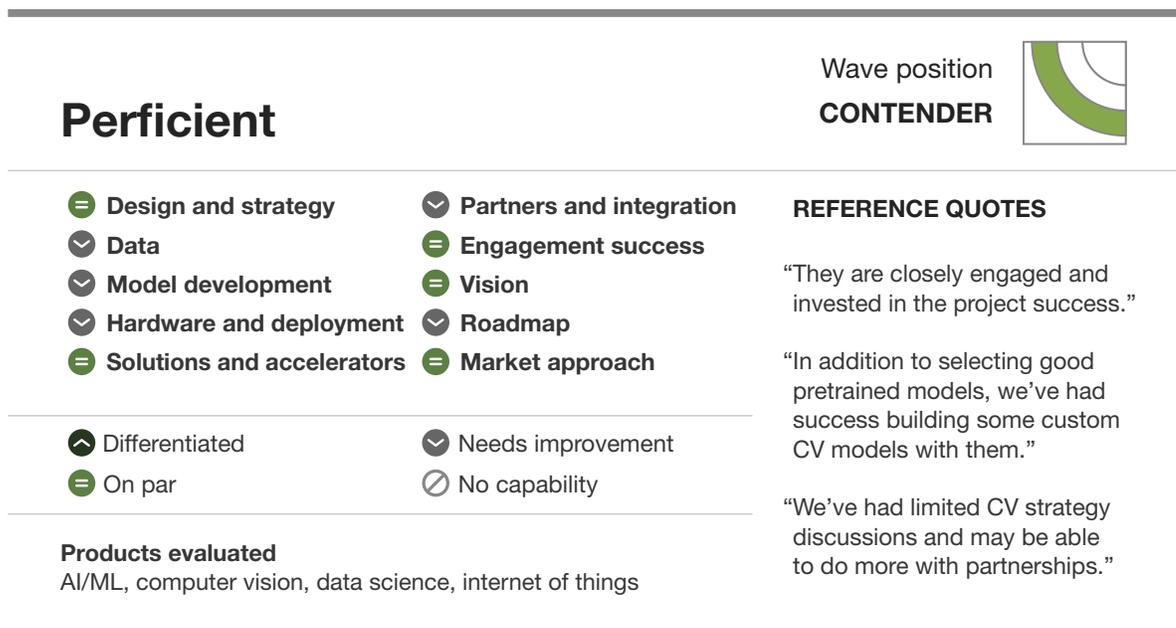
Our evaluation found that Perficient (see Figure 15):

- › **Is proficient at AI strategy development and document automation.** With detailed strategy development, roadmap creation, and capability maturity frameworks, the firm will help you design your AI, machine learning, and CV strategy. It has significant experience implementing CV projects for OCR and document processing in financial services as well.
- › **Needs to broaden its CV capabilities.** Though Perficient has tackled some use cases in financial services, healthcare, retail, and transportation, it has so far undertaken relatively few CV projects.
- › **Would be a good fit as part of a broader engagement or ongoing partnership.** Perficient offers a wide range of digital transformation services and, while you might not seek out the vendor just for CV projects, it makes sense to tap Perficient’s CV capabilities either within or as an extension to an existing engagement.

Perficient Customer Reference Summary

Customers had positive mixed assessments of Perficient. All highlighted the firm’s expertise and dedication, but one mentioned an opportunity to do more with data and hardware partnerships.

FIGURE 15 Perficient QuickCard



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Brillio: Forrester’s Take

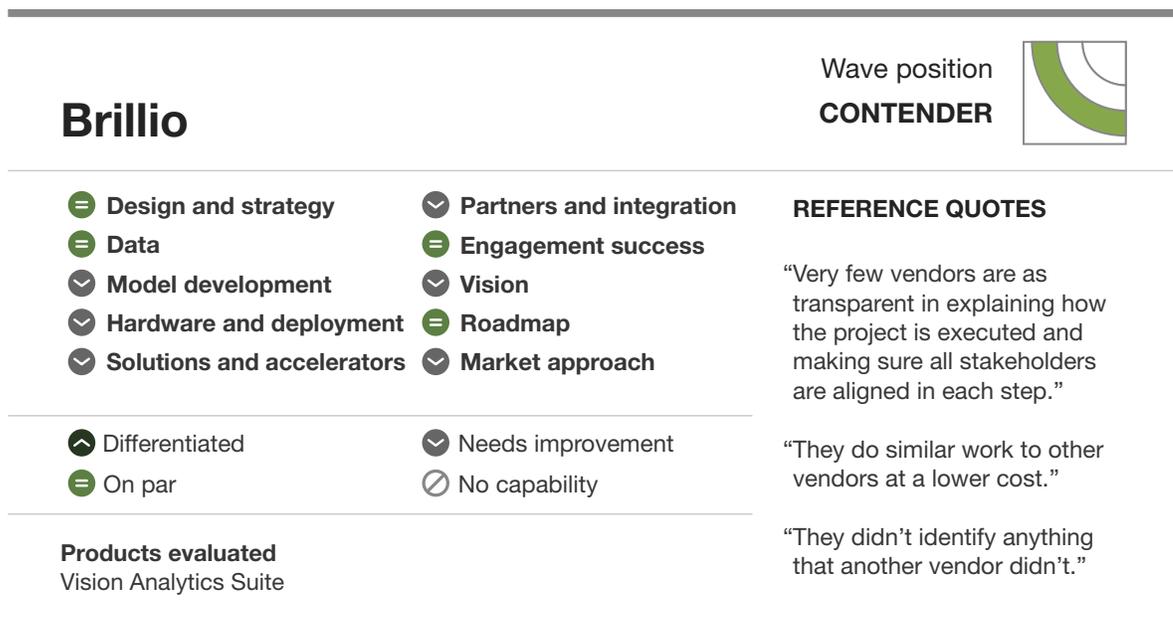
Our evaluation found that Brillio (see Figure 16):

- › **Has tackled some challenging CV use cases and has a promising roadmap.** Not many companies can say they built a vision-based protein crystal classification solution and produce a satisfied customer to boot. Brillio can, and it is building several accelerators, including for document processing, video analysis, and e-retail recommendations.
- › **Needs more experience.** With very few CV projects in production, Brillio hasn’t yet built out the full range of capabilities and partners it needs to build CV solutions at scale.
- › **Is a transparent partner at a good price.** For many buyers, Brillio’s affordability and reliability will outweigh concerns about the firm not having delivered as many CV projects as others.

Brillio Customer Reference Summary

Brillio’s customers emphasized the essentials: that the firm was transparent, and it delivered on time and at lower cost than alternatives. While they gave Brillio decent scores for its model development capabilities, they gave the firm some of the lowest reference scores in the evaluation for most other criteria.

FIGURE 16 Brillio QuickCard



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Gain greater confidence in your decisions by working with Forrester thought leaders to apply our research to your specific business and technology initiatives.

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Supplemental Material

The Forrester New Wave Methodology

We conducted primary research to develop a list of vendors that met our criteria for the evaluation and definition of this emerging market. We evaluated vendors against 10 criteria, seven of which we based on product functionality and three of which we based on strategy. We also reviewed market presence. We invited the top emerging vendors in this space to participate in an RFP-style demonstration and interviewed customer references. We then ranked the vendors along each of the criteria. We used a summation of the strategy scores to determine placement on the x-axis, a summation of the current offering scores to determine placement on the y-axis, and the market presence score to determine marker size. We designated the top-scoring vendors as Leaders.

The Forrester New Wave™: Computer Vision Consultancies, Q4 2020

The 13 Computer Vision Providers That Matter Most And How They Stack Up

Integrity Policy

We conduct all our research, including Forrester New Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

Endnotes

¹ CPG: consumer packaged goods.

We work with business and technology leaders to drive customer-obsessed vision, strategy, and execution that accelerate growth.

PRODUCTS AND SERVICES

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Forrester's research and insights are tailored to your role and critical business initiatives.

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