Industry Analysis: Data Science Analytics Services

Idea In Short

Enterprises should treat data and analytics services spending as a portfolio decision, not a single procurement line. The near-term move is to concentrate budget on vendors who can prove measurable business outcomes rather than staff-augmentation hours, because generative Artificial Intelligence [AI] has collapsed the cost of routine analysis and punished firms still selling time. This industry packages statistical, engineering and business-translation skills that most organizations cannot build internally at scale and it has grown into a market worth well over a hundred billion dollars a year because data volume keeps outrunning in-house capability. Margin is migrating away from generic staffing toward firms that own proprietary accelerators, vertical data assets or outcome-based contracts. Buyers now hold more leverage than at any point in the last decade, since in-house data teams, self-service tools and AI copilots have all become credible substitutes for what consultancies used to bill by the hour.

Data science and analytics services form the professional layer between raw enterprise data and the decisions executives actually make. The industry sells judgment, statistical craft and delivery capacity to organizations that generate more data than they can interpret on their own and it has become one of the fastest-growing corners of professional services precisely because that gap keeps widening rather than closing. Understanding how the industry makes money, where its bargaining power sits and how generative AI is rewriting its cost base matters to any executive deciding whether to build, buy or partner for analytical capability.

Industry at a glance

Data science and analytics services cover the paid, human-delivered work of designing, building and operating data and analytical capability for other organizations. That includes business intelligence and reporting consulting, data engineering and pipeline services,

statistical and machine learning model development delivered as a project or managed service, analytics-as-a-service arrangements billed on subscription or usage and boutique data science advisory focused on a single industry or problem type. It excludes the software and platform vendors who sell the underlying tools and it excludes the broader Artificial Intelligence and machine learning product industry, where the deliverable is a packaged model or application rather than a client-specific engagement.

The customer base sits almost entirely in business-to-business (B2B) and business-to-government (B2G) territory. Large enterprises across banking, insurance, retail, health care, manufacturing and telecommunications commission the bulk of the work and government agencies increasingly buy analytics services for fraud detection, public health surveillance and operational efficiency. Small and mid-sized businesses participate mostly through lighter-weight, productized offerings rather than custom engagements, because the fixed cost of a bespoke data science project rarely clears the return threshold for a smaller balance sheet.

Revenue models split three ways: time-and-materials staffing, still the dominant pattern; fixed-fee project delivery, common for well-scoped platform builds; and outcome-based or subscription arrangements, the smallest but fastest-growing category. The business is labor-intensive rather than capital-intensive, since the primary asset walking out the door every evening is the talent roster, though cloud infrastructure costs have become a meaningful pass-through expense on delivery-heavy contracts. Regulatory intensity varies sharply by vertical; work touching financial services, health data or government records carries substantial compliance overhead, while marketing and operations analytics for unregulated sectors carries comparatively little. The global data analytics consulting services market was estimated near 60 billion dollars in 2024, with the broader big data and analytics services category valued above 169 billion dollars in 2025 and growing at roughly 20 percent annually as enterprises push more of their AI ambitions through third-party delivery partners1.

Industry segmentation

The industry divides cleanly along the value chain and along customer sophistication. Strategy and operating-model advisory sits at one end, where firms help executives decide what data capability to build, how to govern it and how to justify the investment; this segment sells judgment rather than code and commands the highest day rates. Data

engineering and platform services form the largest segment by headcount, covering pipeline construction, data warehouse and lakehouse migration and the unglamorous plumbing that has to exist before any model can run.

Business intelligence and reporting consulting remains the most commoditized segment, built around dashboard design and self-service tool rollout using platforms such as Tableau, Power BI or Looker; margins here have compressed the most because clients increasingly build this capability internally once the initial rollout is done. Applied data science and machine learning delivery covers custom model building for forecasting, pricing, fraud detection and similar use cases and it commands a premium tied to scarce statistical talent. Analytics-as-a-service, delivered on subscription or usage pricing rather than a project statement of work, is the newest and smallest segment, but it grows the fastest because it converts a one-time engagement into a recurring revenue relationship. A final segment, managed analytics operations, covers ongoing run-and-maintain work after a system goes live and it has become the segment most exposed to offshore and AI-assisted delivery because the work is repeatable rather than novel.

These segments are typically dimensioned along value chain position, ranging from upstream strategy through downstream managed operations and along firm type, ranging from global systems integrators and the major accounting-linked consultancies down to specialist boutiques that focus on a single industry vertical or a narrow technical niche such as causal inference or supply chain optimization.

Market structure

The industry's competitive dynamics are best read through the five forces that shape any professional services market: how much leverage buyers hold over price and terms, how dependent firms are on scarce suppliers of talent and technology, how intensely existing competitors fight for the same accounts, how easily new firms can enter and win work and how exposed the industry is to substitute ways of solving the same problem. Data science and analytics services sit at an unusual point on all five dimensions simultaneously:

> entry is easy at the boutique level but nearly impossible at the enterprise level, buyer power has risen sharply as clients build internal capability and the substitute threat from self-service and AI-native tools has become the single most disruptive force reshaping how the industry prices its work

Bargaining power of buyers

Buyers in this industry have grown substantially more powerful over the past five years and the shift traces directly to two developments: the maturation of in-house data teams at large enterprises and the arrival of generative AI tools that let internal staff do work that once required an outside consultancy. A chief data officer who once had no choice but to hire a systems integrator for a data warehouse migration now has real internal options and that optionality shows up directly in rate negotiations. Large enterprise buyers also routinely run multi-vendor panels, splitting work across two or three firms specifically to prevent any single vendor from gaining pricing leverage and procurement functions have become sophisticated enough to benchmark day rates across geographies and firm tiers before a statement of work is signed.

Government buyers behave differently, since public-sector procurement rules constrain price negotiation but create long, sticky contracts once awarded, which shifts power back toward incumbent vendors who hold existing task orders. Mid-market buyers, lacking the scale to run competitive panels, retain less leverage individually but increasingly aggregate demand through managed service providers or industry consortia to claw some of it back. The overall trend, though, points firmly toward buyers and the firms adapting fastest are the ones offering outcome-based pricing that shares risk rather than defending a pure time-and-materials rate card.

Buyer segment	Source of leverage	Trend
Large enterprise, multi-vendor panel	Competitive benchmarking, insourcing threat	Rising
Government and public sector	Procurement rules, long contract cycles	Stable, favors incumbents
Mid-market single-vendor	Limited scale to negotiate	Weak but improving via aggregation
Private equity portfolio companies	Centralized procurement across portfolio	Rising

Bargaining power of buyers

Bargaining power of suppliers

The industry's most consequential supplier is not a company but a labor market: senior data scientists, machine learning engineers and data architects remain scarce relative to demand and that scarcity gives individual talent unusual leverage over the firms that employ them. Compensation for experienced practitioners has risen faster than average professional services pay and attrition at boutique firms routinely runs high because talent can move to a competitor, an in-house role, or independent consulting with little friction. Universities and certification bodies function as a secondary supplier group, shaping the pipeline of credentialed talent that firms can hire against and a shortage of graduates with both statistical depth and business communication skill remains a persistent bottleneck.

Cloud infrastructure providers form the other critical supplier category. Amazon Web Services, Microsoft Azure and Google Cloud set the compute and storage costs that flow through nearly every data engineering and machine learning delivery engagement and their partner-certification programs increasingly dictate which technical architectures a services firm can credibly offer. Because these same hyperscalers also sell competing managed analytics products directly to enterprise clients, they occupy the unusual position of being simultaneously a critical supplier and an emerging competitor, which gives them structural power that most services-industry suppliers do not have. Offshore delivery hubs in India, Eastern Europe and Latin America act as a partial counterweight, supplying scaled technical talent at lower cost, though generative AI is narrowing the labor-cost advantage that made those hubs attractive in the first place.

Supplier category	Leverage mechanism	Effect on margin
Senior data science and engineering talent	Scarcity, high mobility	Compresses margin via wage inflation
Hyperscale cloud providers	Infrastructure dependency, dual role as competitor	Compresses margin, shapes architecture
Certification and training bodies	Gatekeeping of credentialed pipeline	Moderate, raises hiring cost
Offshore delivery talent pools	Scaled lower-cost capacity	Partially offsets margin pressure

Bargaining power of suppliers

Rivalry among existing competitors

Competitive intensity in this industry is high and rising, driven by a fragmented market structure where global systems integrators, the analytics arms of the major accounting and strategy consultancies, offshore-heavy information technology [IT] services firms and thousands of boutique specialists all chase overlapping demand. Concentration is low; no single firm commands more than a modest single-digit share of global spend, which keeps price competition sharp on any deal that is not already locked up through an existing relationship. Firms with global scale, such as Accenture, Deloitte, IBM and Capgemini, compete primarily on breadth, delivery capacity and the ability to staff enterprise-wide transformation programs, while boutiques compete on depth in a single vertical or technical niche, often winning work precisely because a large integrator cannot match their specialized expertise at a comparable price.

Generative AI has intensified rivalry further by compressing the labor hours needed for routine deliverables, which forces firms to compete more explicitly on outcomes and intellectual property rather than headcount. Talent poaching between firms has become a visible feature of competition, since a firm's delivery capability is essentially its people and losing a senior data science lead to a competitor can cost a firm an entire client relationship. Strategic alliances with the three major hyperscalers have also become a competitive battleground, as firms race to be named premier or elite partners in order to win referral business and co-selling opportunities, reshaping the basis of rivalry from pure price competition toward platform allegiance and technical certification depth.

Competitive dimension	How firms compete	Intensity
Global systems integrators	Delivery scale, enterprise relationships	High
Boutique vertical specialists	Domain depth, speed, price	High in their niche
Offshore-heavy IT services firms	Cost, scaled delivery capacity	High on commoditized work
Hyperscaler-aligned practices	Platform certification, co-selling	Rising

Rivalry among existing competitors

Threat of new entrants

Entry barriers in this industry are asymmetric, low at the boutique end and formidable at the enterprise end. A handful of experienced practitioners can register a company, build a portfolio website and win a first mid-market engagement within months, because the capital

requirement for a services business is modest and cloud infrastructure can be rented rather than owned. Generative AI has lowered the entry barrier further by letting small teams produce work that once required a larger bench, meaning solo consultants and two-person shops can now credibly compete for engagements that would have needed a ten-person team five years ago.

Enterprise-level entry is a different story entirely. Winning a global bank or a multinational manufacturer as a client requires security certifications, insurance coverage, reference clients and often a multi-year track record that a new entrant simply cannot manufacture quickly. Procurement departments at large enterprises maintain approved-vendor lists that are difficult to join and switching a core data platform relationship carries enough operational risk that incumbents enjoy real inertia advantages. The net effect is a market that looks highly contestable in aggregate statistics but is, in practice, segmented into a contestable tier and a defended tier, with very different entry economics in each.

Entry barrier	Boutique tier	Enterprise tier
Capital requirement	Low	Moderate, driven by compliance
Credibility and references	Buildable within a year	Requires multi-year track record
Security and compliance certification	Optional	Mandatory gatekeeper
Technology access	Rented cloud, open-source tools	Same, plus hyperscaler partner status

Threat of new entrants

Threat of substitutes

The most disruptive force acting on this industry is not a competing services firm but a set of substitute ways to get the same analytical outcome without hiring a consultancy at all. Self-service business intelligence and no-code analytics platforms let business users build their own dashboards and basic models, eliminating a large share of the work that used to require outside data engineering help. Generative AI copilots embedded directly inside enterprise software, from customer relationship management systems to enterprise resource planning suites, now answer analytical questions in natural language, further reducing demand for custom reporting engagements.

Cloud-native managed analytics platforms compound the substitution threat by packaging data warehousing, transformation and visualization into a single subscription product that a moderately skilled internal team can operate without deep specialist help. In-house data science teams, once rare outside the largest technology companies, have become standard at mid-sized enterprises across most industries and every hire onto an internal analytics team is, functionally, a substitute purchase decision made instead of a services contract. The substitute threat is strongest for standardized, repeatable work such as routine dashboarding and basic pipeline maintenance and weakest for genuinely novel modeling problems, regulatory-driven analytics, or large-scale platform transformations that still require external program management capacity no internal team can spin up on short notice.

Substitute	What it replaces	Trajectory
Self-service BI and no-code tools	Routine dashboard and reporting work	Expanding
Embedded generative AI copilots	Ad hoc analytical queries	Expanding rapidly
Cloud-native managed analytics platforms	Custom-built data infrastructure	Expanding
In-house data science teams	Full engagement, project-based work	Expanding at large enterprises

Threat of substitutes

Value chain and profit pools

The industry's value chain runs from talent and technology inputs through delivery and into ongoing operation. Upstream, firms draw on two inputs: skilled labor, sourced through direct hiring, university pipelines and offshore delivery centers and technology infrastructure, largely rented from hyperscale cloud providers and licensed from data platform vendors such as Snowflake, Databricks or Microsoft. Neither input is owned outright by services firms, which is a structural feature that separates this industry from asset-heavy sectors and explains why balance sheets stay light even as revenue scales.

Production, in this industry, means the actual engagement delivery: discovery and scoping, solution design, build and implementation and testing and validation. This is where most billable hours accumulate and it is also where generative AI has done the most damage to traditional economics, since code generation, data cleaning and documentation tasks that used to consume weeks of junior analyst time now take hours. Distribution in a professional

services context means how a firm gets in front of buyers, whether through direct enterprise sales teams, hyperscaler co-selling arrangements, or referral networks built on past client success and this stage has become more expensive as buyer procurement processes lengthen and competitive bidding intensifies.

The customer interface stage covers account management, executive relationship-building and the change-management work required to get a delivered system actually adopted and this stage is chronically underinvested relative to its importance, since technically excellent deliverables regularly fail because no one managed the human adoption curve. Enabling infrastructure closes the chain:

> internal knowledge management, reusable accelerators and codebases, training programs and quality assurance functions that determine whether a firm can deliver consistently at scale rather than reinventing every engagement from scratch

Profit pool

Profit concentrates disproportionately at the two ends of the value chain and thins out in the middle. Strategy and operating-model advisory captures outsized margin because it sells judgment that is hard to commoditize and because senior partners, not junior analysts, deliver it. Enabling infrastructure, specifically proprietary accelerators, reusable code libraries and firm-specific methodologies, has become the other major profit pool, because a firm that can reuse intellectual property across ten client engagements earns far higher margin on each subsequent one than a firm building everything from scratch.

The middle of the chain, covering routine build-and-implement work and ongoing managed operations, has seen the steepest margin compression and that compression is exactly where generative AI concentrates its productivity gains. This has produced a visible bifurcation: firms with distinctive intellectual property and outcome-based contracts are growing revenue at multiples of firms still selling time and materials, with one 2025 benchmark of professional services firms finding that value-based pricing adopters grew revenue at roughly four times the rate of firms holding onto pure time-based billing2. The profit pool is migrating, in short, away from labor arbitrage and toward owned assets, whether those assets are software, data, or genuinely scarce expertise.

Industry economics and business models

Four business model patterns dominate the industry. Time-and-materials staffing remains the largest by revenue, billing clients for hours worked at a day rate and it is the model most exposed to AI-driven compression because it directly monetizes labor hours that AI is shrinking. Fixed-fee project delivery quotes a total price for a defined scope, shifting delivery-efficiency risk onto the services firm and rewarding firms that have built accelerators to deliver faster than the fee assumes.

Outcome-based and gain-share contracts tie a portion of fees to a measurable business result, such as a percentage of cost savings identified or revenue lift generated and though still a minority of total industry revenue, this model is growing fastest because sophisticated buyers increasingly demand it as a condition of doing business. Analytics-as-a-service, the fourth pattern, packages ongoing delivery into a subscription or usage-based fee, converting what used to be a one-time project into a recurring revenue relationship and giving the vendor much higher predictability than project-based work ever offered. Firms increasingly blend these models within a single client relationship, using a fixed-fee initial build to win the account and then converting to a subscription or outcome-based arrangement for ongoing operation, a sequencing that mirrors how software companies moved from perpetual licenses to subscription revenue a decade earlier.

Cost drivers and scalability

Labor is overwhelmingly the dominant cost line in this industry, typically consuming a majority of revenue once fully loaded compensation, benefits and overhead are counted, which makes utilization, the percentage of a consultant's available hours that get billed to a client, the single most important operating metric a firm tracks. A firm running utilization in the high sixties or low seventies percent range, a common benchmark across professional services, sits in reasonably healthy territory, while utilization drifting into the fifties signals either weak demand or poor staffing discipline.

Economies of scale exist but are modest compared with software or manufacturing businesses, since adding a client rarely reduces the marginal cost of serving the next one the way it would for a digital product. Economies of scope matter more: a firm that has already built a fraud-detection accelerator for one bank can resell a variant of that asset to a second bank at a fraction of the original build cost, which is why reusable intellectual

property has become the primary scalability lever in an otherwise labor-bound business. Generative AI is reshaping unit economics directly by cutting the labor hours needed per unit of delivered work and firms that convert those savings into higher margin, rather than passing all of it through as lower prices, will scale profit faster than revenue over the next several years. The flywheel that compounds fastest in this industry links reusable accelerators to faster delivery, faster delivery to better margin and better margin to more investment in the next accelerator, a loop that favors firms disciplined enough to invest delivery savings back into intellectual property rather than simply pocketing them as short-term profit.

Moats, advantages and strategic levers

Durable advantage in this industry rarely comes from a single technology, since most tools and platforms are available to any competitor willing to pay for a license. Real moats build around four things:

> proprietary accelerators and codebases that compress delivery time in ways competitors cannot easily replicate, deep vertical domain expertise that lets a firm speak a client's operational language rather than a generic data science vocabulary, switching costs created by deeply embedded systems and institutional knowledge that make replacing an incumbent vendor operationally risky for a client and reputational capital built through reference clients and case studies that lower a buyer's perceived risk of hiring a given firm

Data and learning advantages matter more at the boutique and platform-adjacent end of the industry than at the generalist end, since a firm that has delivered dozens of engagements in, say, insurance claims analytics accumulates pattern knowledge about what works that a generalist competitor cannot match without years of catching up. Network effects are weaker here than in platform businesses but still present in a modest form through hyperscaler partner ecosystems, where a firm certified at the highest partner tier gains referral flow that compounds over time. Regulatory moats exist narrowly, mainly in government and defense-adjacent work requiring security clearances, but they protect a small slice of the market rather than the industry as a whole.

Strategic levers

Firms competing in this industry pull a limited set of levers with outsized effect. Narrowing customer segment focus to a specific vertical, rather than pursuing a horizontal, industry-agnostic strategy, tends to produce faster growth and higher margin because it lets a firm build reusable domain assets and command a premium for expertise a generalist cannot match. Product scope decisions matter almost as much:

> firms that move from pure project delivery toward productized offerings, whether a licensed accelerator or a subscription analytics service, build revenue predictability that a project-only firm never achieves

Vertical integration versus partnering is a live strategic choice around the hyperscaler relationship specifically, since a firm can either build deep proprietary technology independent of any single cloud platform or lean into a tight partnership with one hyperscaler to access co-selling and technical support and each path carries different risk profiles around platform lock-in and negotiating leverage. Geographic expansion, particularly into offshore and nearshore delivery hubs, remains a lever for cost management, though its relative value is shrinking as AI narrows the labor-cost gap that made offshore expansion attractive in the first place. Ecosystem orchestration, positioning a firm as the integrator that stitches together multiple point solutions, cloud platforms and internal client systems into a coherent whole, has become an increasingly valuable lever precisely because clients face a more fragmented technology landscape than they did five years ago and need someone credible to make sense of it.

Structural risks, regulation and trends

The dominant structural risk facing this industry is technology disruption from within: generative AI is simultaneously the industry's biggest growth driver, since demand for AI strategy and implementation work has surged and its biggest margin threat, since the same technology automates away the billable hours that funded decades of consulting economics. Data privacy and sovereignty regulation, from Europe's General Data Protection Regulation to a growing patchwork of national data-localization rules, adds compliance

overhead and occasionally restricts where and how client data can be processed, disproportionately affecting firms with globally distributed delivery models. Talent-pipeline risk compounds this: major professional services firms have cut graduate hiring meaningfully in recent recruiting cycles, with reductions reported in the double digits at several large firms, a pattern that threatens the apprenticeship model through which the industry has historically trained its senior talent3.

Macro demand drivers remain favorable overall. Chief data and analytics officers report that Artificial Intelligence readiness sits at the top of their investment agenda for the second consecutive year and a majority now hold direct responsibility for enterprise AI strategy, which routes budget toward the services firms that can help build the underlying data foundation those AI ambitions require4. Asia-Pacific has overtaken other regions as the largest market for big data and analytics services, reflecting both a manufacturing base hungry for operational analytics and a large, cost-competitive delivery talent pool5. Supply-side trends favor firms that can demonstrate measurable outcomes over firms selling generic capability and clients increasingly demand evidence that a proposed engagement will move a specific business metric before signing.

For firms entering this industry, the strategic playbook favors a narrow niche over a broad horizontal offering, since credibility in a single vertical or technical specialty is the fastest route to winning first engagements against entrenched generalist competitors. A partner-heavy go-to-market, riding hyperscaler co-selling programs rather than building enterprise sales capacity from scratch, lowers customer-acquisition cost meaningfully for a new entrant. Regulatory strategy matters mainly for firms targeting government, health care or financial services clients, where investing early in security certification and compliance infrastructure pays for itself through access to a smaller but stickier pool of long-duration contracts. For incumbents, the playbook centers on converting existing time-and-materials relationships into outcome-based or subscription arrangements before a competitor does it first, expanding wallet share within existing accounts rather than chasing new logos and deepening moats by systematically converting delivery experience into reusable intellectual property instead of treating every engagement as a one-off.

Caselet: Thoughtworks and the boutique-to-scale trajectory

Thoughtworks, a technology consultancy founded in Chicago in 1993, offers a useful window into how a firm can build a services business around deep technical craft rather

than headcount alone and how that model gets tested once the firm scales and goes public. The company built its early reputation on software engineering excellence and agile delivery methodology, publishing widely read technical writing and open-source tools that built credibility with technical buyers long before it became a broad data and analytics consultancy. That reputation-first approach, rather than a traditional sales-led growth strategy, let Thoughtworks command premium rates and attract technically sophisticated clients who valued engineering rigor over brand recognition alone.

Over the following two decades, Thoughtworks expanded from pure software delivery into a broader data engineering, analytics and digital transformation practice, growing to more than 10,000 employees across dozens of countries by the time it went public on the NASDAQ exchange in 2021. The firm's expansion into data and analytics followed a pattern common across the industry:

> clients who had trusted Thoughtworks to build software systems increasingly asked the same teams to help them make sense of the data those systems generated, a natural adjacency that let the firm cross-sell into analytics without having to build brand credibility from scratch in a new category

The firm's post-initial public offering trajectory illustrates the margin pressure running through the broader industry. Thoughtworks faced revenue declines and workforce reductions in the years following its public listing, as macroeconomic tightening led enterprise clients to delay discretionary technology and data transformation spending and the company was subsequently taken private again in 2024 by its majority shareholder, funds affiliated with private equity firm Apax Partners, in a deal that valued the company well below its initial public offering price6. The episode demonstrates a structural vulnerability shared across the industry:

> firms whose revenue leans heavily on discretionary transformation budgets are exposed to demand volatility in ways that firms anchored in regulatory or cost-reduction analytics, categories of spend that persist through downturns, are not

Thoughtworks' experience also illustrates the industry's pivot toward Artificial Intelligence-related work as the primary growth engine. The firm has repositioned significant portions of its practice around generative AI enablement, data platform modernization and AI governance advisory, following enterprise demand toward the same AI-readiness priorities that chief data officers now name as their top investment focus. That repositioning shows both the opportunity and the risk facing mid-sized specialist firms industry-wide:

> the same technology reshaping client demand is also compressing the billable-hour economics that funded firms like Thoughtworks for three decades, forcing a genuine business-model transition rather than a simple service-line refresh

The caselet underscores a pattern visible across the industry more broadly. Firms that built genuine technical differentiation and reputation among practitioners can achieve scale and premium positioning that a pure staffing competitor cannot match, but that differentiation alone does not insulate a firm from macro demand cycles or from the structural pressure that generative AI is placing on time-based revenue models. Surviving the next decade in this industry requires pairing technical credibility with a revenue model resilient enough to absorb both cyclical swings and the ongoing compression of billable analytical labor.

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Summary

Data science and analytics services exist to convert enterprise information into decisions faster than any single company could manage alone and that translation function keeps growing in value even as the tools around it get cheaper. The economics reward firms that

stop billing hours and start owning intellectual property, vertical data models or risk-sharing contracts, because generative AI has made raw analytical labor a commodity. Talent scarcity, cloud dependency and buyer sophistication remain the forces that decide who keeps margin. The winners over the next decade will be the consultancies and boutiques that industrialize delivery, price for outcomes and treat their accumulated project data as a compounding asset rather than a byproduct of billable work.