Intelligent Automation in Business Processes (IABP) – Solution Provider Landscape with Solutions PEAK Matrix® Assessment 2020

Service Optimization Technologies (SOT)

Market Report – March 2020: Complimentary Abstract / Table of Contents

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- Other | Market intelligence, service provider capabilities, technologies, contract assessment

Membership information

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  – BFS BPS, HLS BPS, Insurance BPS, FAO, HR Services, PO, RPO, SOT
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Background and methodology of the research

Background of the research

The Business Process Services (BPS) market is facing unprecedented change. Multiple digital elements are disrupting the status quo on both the demand as well as supply side. Enterprises are expecting not only cost reduction but also next-generation benefits from their relationships and solution providers have recognized the need to pivot quickly from the traditional labor arbitrage-driven model to a digital-powered one to provide those benefits to their buyers. One of the most potent digital levers enabling this transformation is Intelligent Automation in Business Processes (IABP). A spectrum of IABP solutions leveraging a combination of RPA, Artificial Intelligence (AI), and advanced analytics are being deployed by solution providers to help buyers attain certain key benefits – higher speed, improved accuracy, enhanced customer experience and reduced cost, among others.

In this research study we analyze the dynamics of IABP along the following dimensions:

- Assessment of Solution provider capabilities in the IABP PEAK Matrix® 2020
- Solution provider competitive landscape

The scope and methodology of this report includes:

A focus on Intelligent Automation in Business Processes (IABP) solutions, offered either on a standalone basis or as part of a broader BPO deal, along with the associated implementation, consulting and maintenance services

- **Services scope:** Business Process Services (BPS)
- **Geographic scope:** Global
- **Solution provider scope:** 24 providers, including leading broad-based BPS providers, consulting firms, and specialist system integrators whose offerings fall in one of the 3 categories
  – IABP Services which **i**ncludes implementation, consulting, and maintenance. The automation technology license is already with the enterprise
  – IABP Solutions where the solution provider sources the automation technology as well as provides implementation, consulting, and maintenance services
  – Intelligent automation offered as part of a broader BPO deal within areas such as Procurement, HR, and banking

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Overview and abbreviated summary of key messages

This report examines the global 2020 IABP solution provider landscape. It focuses on solution provider positioning and assessment of solution provider delivery capabilities. It also identifies the key implications of the research findings for buyers and solution providers.

Some of the findings in this report, among others, are:

IABP PEAK Matrix® 2020

- Everest Group classifies IABP solution providers on the Everest Group proprietary PEAK® Matrix into the three categories of Leaders, Major Contenders and Aspirants
- Based on Everest Group's comprehensive evaluation framework, the PEAK Matrix, 24 IABP solution providers are segmented into three categories:
  - Leaders: Accenture, Capgemini, Cognizant, IBM, TCS, and Wipro
  - Major Contenders: DXC Technology, EXL, Genpact, Hexaware, HCL Technologies, Infosys, Mphasis, NTT DATA, PwC, Sutherland Global Services, Symphony, Tech Mahindra, and WNS
  - Aspirants: DigiBlu, Digital Workforce, Exela Technologies, qBotica, and RPATech
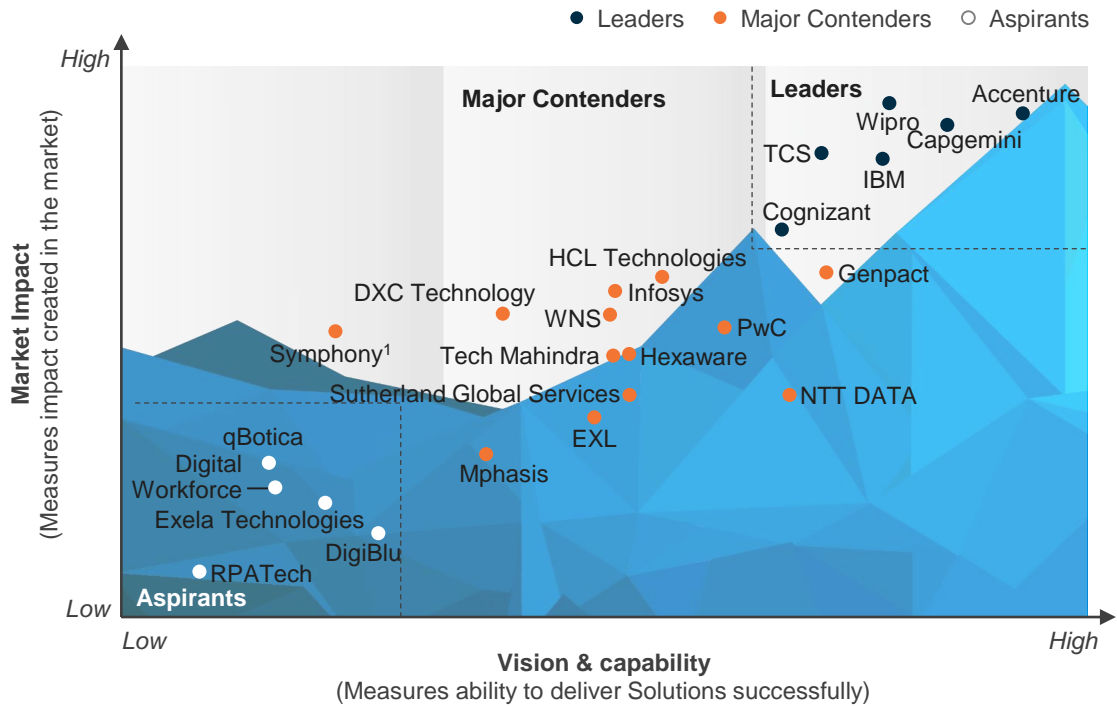
IABP competitive landscape

- Accenture, TCS and Wipro have the highest market share in terms of active IABP engagements, together accounting for nearly 40% of the deployments
- In most geographies, TCS and Wipro have the largest share of active clients with IABP deployments. Continental Europe is dominated by Capgemini, while IBM has good traction in the APAC region

Solution provider capabilities

- Everest Group delineates each of the 24 service provider's strengths and areas of improvement
- The in-depth commentary is intended to help service providers, enterprise buyers and other stakeholders to understand the current situation and possible future direction of the provider landscape

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This study offers three distinct chapters providing a deep dive into key aspects of the IABP market; below are three charts to illustrate the depth of the report

Assessment of IABP Solution Providers

● Leaders ● Major Contenders ○ Aspirants

High

Market Impact (Measures impact created in the market)

Major Contenders

Leaders

Accenture
Wipro
Capgemini
TCS
IBM
Cognizant
HCL Technologies
DXC Technology
Infosys
Genpact
WNS
PwC
Symphony[1]
Tech Mahindra
Hexaware
Sutherland Global Services
NTT DATA
EXL
qBotica
Digital Workforce
Mphasis
Exela Technologies
DigiBlu
RPATech

Aspirants

Low

Low — **High**

Vision & capability (Measures ability to deliver Solutions successfully)

1 Symphony is a part of Sykes

Capability assessment

Illustrative example

Measure of capability: ● High ◔ Low

Solution provider	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Services capability	Innovation & investments	Engagement & commercial model	Overall
Solution provider 1	◕	◔	◑	◕	◑	◔	◔	◔	◑	◑
Solution provider 2	◔	◑	◑	◑	◑	◔	◑	◕	◑	◑
Solution provider 3	◔	◕	◕	◕	◕	◕	◕	◕	◕	◕
Solution provider 4	◔	◔	◑	◑	◑	◑	◕	◕	◕	◑
Solution provider 5	◔	◑	◑	◑	◑	◑	◑	◕	◑	◑
Solution provider 6	◕	◑	◔	◑	◔	◔	◑	◑	◕	◔
Solution provider 7	◕	◔	◑	◕	◑	◑	◑	●	◑	◕
Solution provider 8	◑	◔	◕	◕	◔	◑	◔	◔	◑	◑

Everest Group's remarks on solution providers

Illustrative example

Measure of capability: ● High ◔ Low

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Services capability	Innovation & investments	Engagement & commercial model	Overall
◔	◑	●	◕	◑	◔	◑	●	●	◕

Strengths

- Solution provider 1, has a robust presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently

- is focused on delivering business outcomes for its clients by transforming their operations using its intelligent automation, data analytics and Artificial Intelligence capabilities

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as post implementation run support

- A major chunk of it's intelligent automation portfolio is focused on F&A and procurement functions. While there is a huge potential in these areas, it could also examine some of the other high potential processes in banking, insurance, etc.

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Research calendar – Service Optimization Technologies (SOT)

			Published		Planned		Current release

Flagship SOT reports	Release date
Robotic Process Automation (RPA) – Technology Vendor Profile Compendium 2019	July 2019
Robotic Process Automation (RPA) Annual Report 2019	September 2019
Enterprise RPA Automation Adoption – Pinnacle Model® Analysis 2019	December 2019
Intelligent Automation in Business Processes (IABP) - Solution Provider Landscape with Solutions PEAK Matrix® Assessment 2020	**March 2020**
IA in Business Process Services (BPS) –State of the Market Report 2020	Q1 2020
IVA products PEAK Matrix™ Assessment 2020	Q1 2020
Process Mining (PM) – Technology Vendor Landscape with PEAK Matrix Assessment	Q1 2020
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2019	Q1 2020

Thematic SOT reports	
Intelligent Automation: Accelerating from Short-term Wins to Long-term Strategic Business Outcomes	March 2019
Advanced Content Intelligence – Pivotal Technology to Empower the New Age Organization	May 2019
Intelligent Document Processing (IDP) Annual Report 2019 – Let AI Do the Reading	May 2019
Who Takes on the RPA Mantle?	June 2019
Intelligent Document Processing (IDP) Playbook	September 2019
AI in Business – A Primer	Q1 2020
UiPath Playbook	Q1 2020

Note: For a list of all of our published SOT reports, please refer to our website page

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Additional SOT research references

The following documents are recommended for additional insight on the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

1. **Intelligent Automation: Accelerating from Short-term Wins to Long-term Strategic Business Outcomes** (EGR-2019-38-V-3088); 2019. This viewpoint examines how enterprises can adopt an automation strategy that embraces Intelligent Automation to successfully accelerate from short-term wins to long-term strategic business outcomes

2. **Creating Business Value Through a Next-Generation Smart Digital Workforce** (EGR-2018-38-V-2548); 2018. A viewpoint focusing on leveraging RPA and AI-based automation solutions to create smart digital workforce and generate business value for enterprises

3. **Artificial Intelligence in Global Services – State of the Market Report** (EGR-2017-13-R-2397); 2017. This report helps bring about a better understanding of the AI market from the purview of global services. In particular, it includes a holistic definition of AI, buyer adoption trends, learnings from early adopters and a deep-dive into the AI technology vendor landscape

For more information on this and other research published by Everest Group, please contact us:

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About Everest Group

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