Intelligent Automation in Business Processes (IABP) – State of the Market Report 2020

Service Optimization Technologies (SOT)
State of the Market Report – July 2020: Complimentary Abstract / Table of Contents

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Membership information

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  – Service Optimization Technologies (SOT)

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Table of contents

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Table of contents

Background of the research

- Enterprise business operations are facing unprecedented pressure, even more so due to the ongoing COVID-19 crisis. Multiple digital elements are disrupting the status quo. Both on the demand as well as supply side, digital technologies, automation in particular, are becoming ubiquitous. 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 to a digital-powered model 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 is being deployed by solution providers to help buyers attain certain key benefits – higher speed, improved accuracy, enhanced customer experience, and reduced cost, among others

- Ancillary technologies such as process mining are also making inroads, resulting in the development of deeper and more holistic solutions within the business process technology ecosystem

- In this research, we analyze the dynamics of the IABP space, along the following dimensions:
  - IABP market overview
  - IABP solution characteristics
  - IABP solution provider landscape
  - The future and how to prepare for it

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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 growth in the IABP market, changing market dynamics and emerging solution provider trends, assessment of solution provider delivery capabilities, and key IABP solution provider profiles. 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 market overview	• IABP is witnessing rapid growth in adoption at nearly 60% from 2017 to 2018, this growth is estimated to reach ~ 65% by the end of 2019 • IABP growth is being driven by the need for foundational outcomes such as cost reduction and efficiency, as well as higher-order ones such as superior customer experience and agility
IABP buyer adoption trends	• Adoption of IABP is the highest in North America, followed by Continental Europe, the UK, and Asia Pacific • Industry-specific use cases, especially in regulated industries such as BFSI and healthcare see the highest IABP adoption, followed closely by F&A • While large-sized buyers see the maximum adoption, mid-size buyers have grown and hold a considerable share of the overall adoption pie
IABP solution characteristics	• Global sourcing: The APAC region dominates as a source of IABP talent, with EMEA being a distant second • Commercial model: Traditional input-based pricing is the most common model. However, we see increasing adoption of progressive models such as outcome- and transaction-based pricing in the market
IABP solution provider 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 significant share of active clients with IABP deployments. Continental Europe is dominated by Capgemini, while IBM has good traction in the APAC region

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

IABP market overview

Intelligent Automation in Business Processes (IABP) clients
Percentage of IABP clients

XX% CAGR (2017-19)
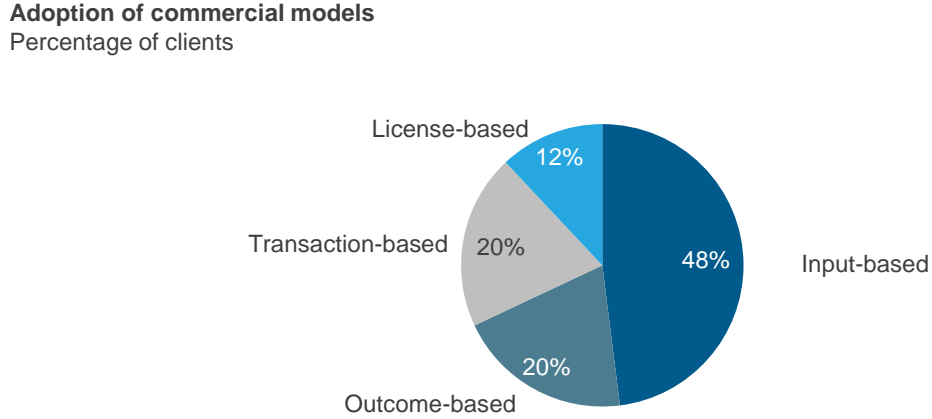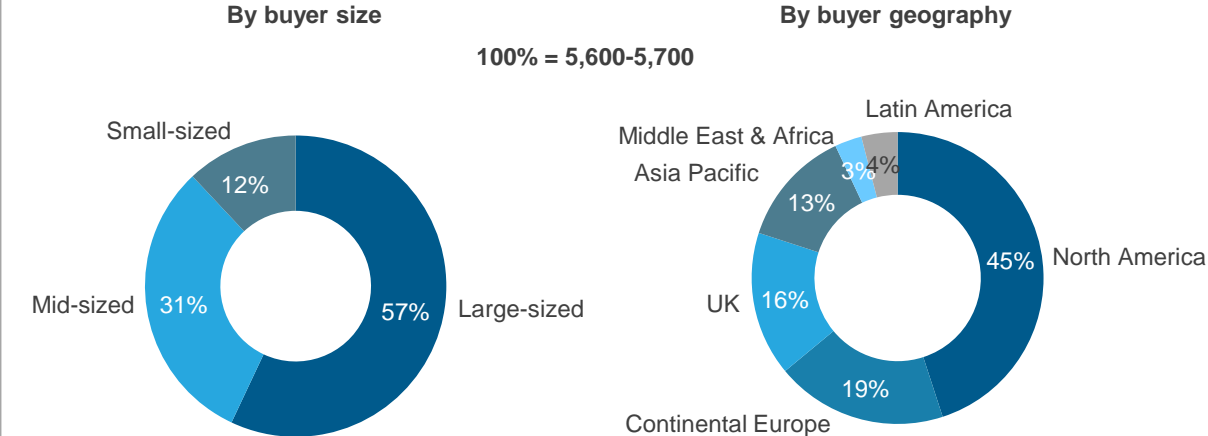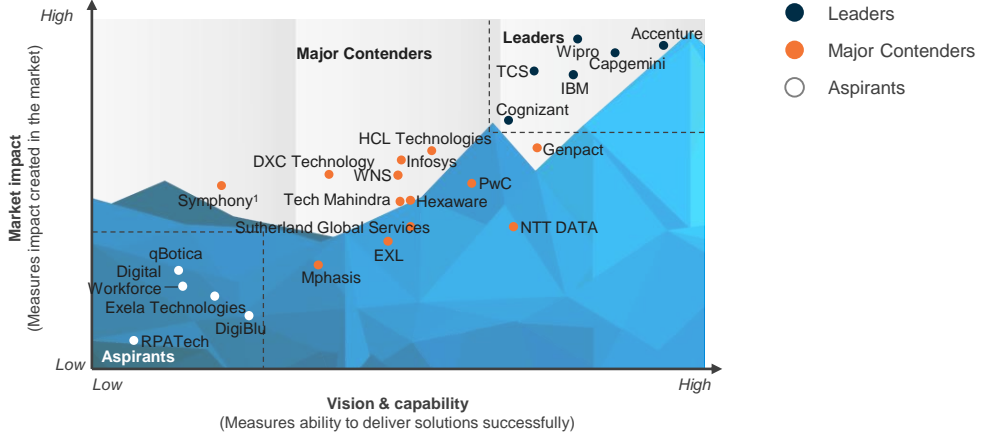
60-70%

50-60%

7,100-7,300
- 29%
- 33%
- 38%

4,300-4,500
- 34%
- 29%
- 37%

2,800-3,000
- 40%
- 25%
- 35%

IABP embedded BPO engagements
IABP solutions engagements
IABP services engagements

2017   2018   2019E
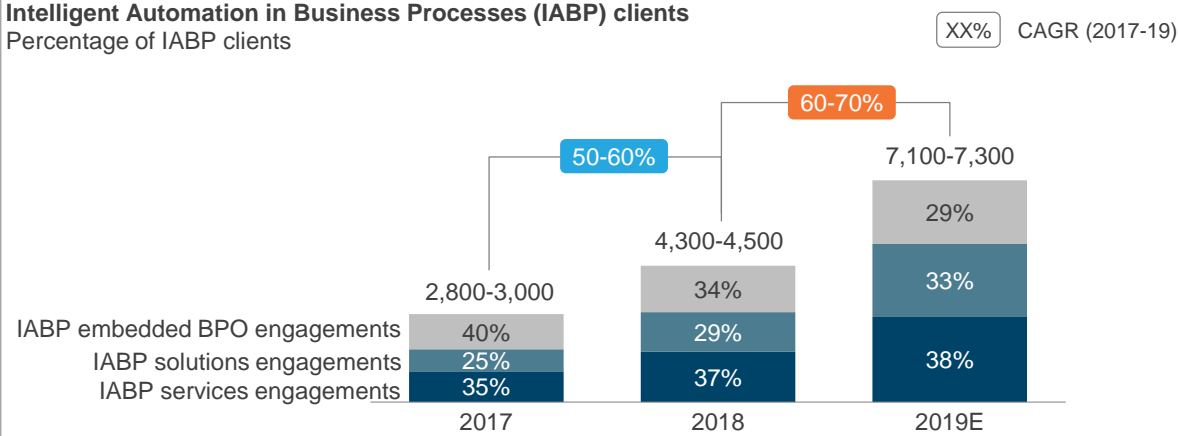
IABP solutioning trends

Adoption of commercial models
Percentage of clients

- License-based 12%
- Transaction-based 20%
- Input-based 48%
- Outcome-based 20%

IABP adoption trends

By buyer size

By buyer geography

100% = 5,600-5,700

By buyer size:
- Small-sized 12%
- Mid-sized 31%
- Large-sized 57%

By buyer geography:
- Latin America 4%
- Middle East & Africa 3%
- Asia Pacific 13%
- UK 16%
- Continental Europe 19%
- North America 45%

Service provider landscape

High

Major Contenders

Leaders

Accenture
Wipro
Capgemini
TCS
IBM
Cognizant

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

Aspirants

Low   High

Market impact
(Measures impact created in the market)

Vision & capability
(Measures ability to deliver solutions successfully)

- ● Leaders
- ● Major Contenders
- ○ Aspirants

Research calendar – Service Optimization Technologies (SOT)

▮ Published ▮ Planned ⬚ Current release

Flagship Service Optimization Technologies (SOT) reports	Release date
Enterprise IA Automation Adoption – Pinnacle Model® Analysis 2019	December 2019
Intelligent Automation in Business Processes (IABP) Solution Provider Landscape with PEAK Matrix® Assessment 2020	February 2020
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	February 2020
IA in Business Process Services (BPS) – Solution provider compendium 2020	March 2020
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment	March 2020
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix® Assessment	March 2020
Intelligent Automation in Business Processes (IABP) – State of the Market Report 2020	**July 2020**
Robotic Process Automation (RPA) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	Q3 2020

Thematic Service Optimization Technologies (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
Who Takes on the RPA Mantle?	June 2019
Intelligent Document Processing (IDP) Playbook	September 2019
360-degree Enterprise Automation Playbook	May 2020
Intelligent Automation Orchestration	Q3 2020

Note: For a list of all of our published Service Optimization Technologies (SOT) reports, please refer to our website page

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Additional SOT research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details 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:

Anil Vijayan, Vice President: anil.vijayan@everestgrp.com

Priyanka Mitra, Practice Director: priyanka.mitra@everestgrp.com

SOT Team: SOTresearch@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com

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Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

New York
info@everestgrp.com
+1-646-805-4000

Toronto
canada@everestgrp.com
+1-416-388-6765

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