

***ISG** Provider Lens™

Intelligent Automation – Solutions & Services

Artificial Intelligence for IT Operations (AIOps)

U.K. 2021

Quadrant
Report



A research report
comparing provider
strengths, challenges
and competitive
differentiators

Customized report courtesy of:



December 2021

About this Report

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of September 2021, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars (\$US) unless noted.

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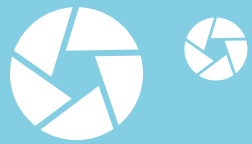
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EXECUTIVE SUMMARY

Intelligent Automation—Solutions and Services 2021

Recent years have witnessed a revolution in the automation of products, services, IT functions, business processes, and consumer and employee interactions. This revolution is aptly called intelligent automation, because it is based on algorithmic technologies that can replicate aspects of human cognition such as pattern detection, context awareness, adaptability, language understanding, decision-making and action. It draws on a vast range of technologies, principally machine learning and deep learning, but also general AI, computer vision, voice recognition, natural language processing (NLP), Internet of Things devices and sensors and robotic process automation (RPA) to name a few. Intelligent automation is now being applied to areas of business, consumer and employee life never dreamt possible a few years ago—from data-intensive processes such as invoicing and export compliance to managing healthcare records to applying for a mortgage or loan extension.

The COVID-19 pandemic that began in early 2020 has proved to be a watershed moment for the use of intelligent automation in business and industry. Faced with a surge in online working and consumption, many organisations turned to intelligent automation solutions to automate processes such as employee and customer interactions. In doing so organisations have taken a step back and begun to see the potential for completely new ways of working, producing and consuming, all underpinned by intelligent automation technologies.

But challenges abound too. Many organisations, especially small and medium sized enterprises, are new to the world of intelligent automation and face a dizzying array of different

solutions, technologies and providers. For some, their views of intelligent automation have been tainted by previous automation experiences that fizzled out, or that disappointed in terms of the results delivered. For large enterprises, many of whom will have adopted some elements of intelligent automation across their organisations, the challenges are legion: moving from piecemeal automation to streamline end-to-end processes, bringing governance to sprawling automation initiatives across different functions and organisational silos, discovering and assessing the right opportunities for process automation, imbuing the workforce with the right skills for human-machine collaboration, and instituting effective change management approaches, to name but a few.

ISG has observed the following trends in the global intelligent business automation space:

Move to hyper-automation: Previous automation initiatives were often episodic, focussed on discrete processes or business problems, and often disconnected from wider process flows and parts of the organisation. Business impact was often minimal. Today enterprises are increasingly looking for hyper-automation, holistic automation solutions that address the complete lifecycle of automation across the organisation, from process discovery and architecture, roadmap creation, robotic process automation, to operating model change and skills for human-machine collaboration. Hyper-automation doesn't take existing processes as given, but considers the opportunities to completely reimagine organisational processes, operating models, and ways of working for improved business outcomes.

The low-code/citizen developer revolution: A recurring theme in our conversations with providers was the growing importance of the low-code automation and citizen development movement, which enables workers or consumers with few AI skills of their own to develop their own AI-based automation solutions, or variations on existing ones, through “drag-and-drop methods, minimal code changes, or access to libraries of existing user cases, data, and code. Providers are investing in low-code capabilities for several reasons, partly to address the scarcity of “high-code” AI talent, but also as a means to empower the workforce to innovate around existing processes and tailor their own solutions to business challenges.

Acceleration to cloud-based services: With the spread of intelligent automation to the midsized and small enterprise market, there is a growing need for low-cost entry models that simplify the use of automation solutions by enterprises. Of particular importance is the growth of cloud-based, software-as-a-service (SaaS) automation. A growing number of providers are now providing SaaS-style automation offerings—in process mining, conversational AI, or intelligent document processing—on a consumption basis and moving away from previous subscription models.

Plug and play: as part of the simplification and spread of AI-powered intelligent automation, ISG sees a growing use of plug-and-play or out-of-the-box solutions designed to accelerate the adoption of intelligent automation and bring an early return on investment to enterprises. In conversational AI we see increasing use of pre-trained “skills” or “agent personas” tailored to particular uses, as well as extensive use of libraries of reusable assets and databases. One-shot or low-shot AI is also increasingly common—machine-learning solutions that are designed to discover or automate processes with minimal training.

Wanted: new AI skills: Intelligent automation means new skills and roles for humans. With the growing use of AI-powered automation, human workers will need new ways to interact with and collaborate with machines, whether using low-code techniques to create a business template on the fly, or training a digital colleague to interact with customers. Completely new roles are and will be needed, for example conversational designers in the world of conversational AI.

The ISG Provider Lens report for Intelligent Automation this year compares service providers on their proprietary solutions and services and positions them based on their portfolios and future outlook. This comparison has been done across five quadrants — Intelligent Business Automation, AI Ops, Conversational AI, Intelligent Document Processing, and Process Discovery and Mining.

Disclaimer: ISG Automation is a sister division to ISG Research and therefore we have purposely selected quadrants and eligibility criteria that would exclude ISG Automation from being evaluated in order to avoid any appearance of a conflict of interest.

UK Market Overview

Intelligent Business Automation

According to ISG research, the global market for IT and business services grew at its fastest ever pace in the third quarter of 2021, propelled by surging demand for cloud computing and other digital capabilities. Data from the ISG Index™, which measures commercial outsourcing contracts with an annual contract value (AVC) of \$5 million or more, show that the combined market for as-a-service and managed services in EMEA reached \$6.5 billion in the third quarter of 2021, up 36 percent from the previous year.

The UK market (along with the DACH region) was a notable exception to this general trend of vigorous IT spending, falling back for the quarter. This is likely a reflection of the difficult economic context in the UK, with the UK economy currently experiencing a triple supply shock: the long-lasting after-effects of the pandemic, added supply chain complexity from Brexit, and a sharp rise in energy prices. While the UK economy has now reopened for business, the pandemic has contributed to significant labour shortages as key parts of the training and recruitment system (e.g., for transport workers) were severely disrupted during the lockdowns. Yet these very factors—labour scarcity, supply chain complexity, and rising costs—are also likely to spur UK businesses toward greater use of intelligent business automation solutions and services over the next several years, as businesses look for faster and more efficient ways to do business, deliver goods and services, cut through complexity, streamline their operations, and ultimately connect with customers across new digital channels.

AIOps

With the shift to online consumption and remote working precipitated by the pandemic, the stakes for AIOps have never been greater: millions of consumers, citizens and workers in the UK now rely on the smooth functioning of IT systems for every facet of their daily lives. We now see many UK enterprises looking to global service integrators and IT providers to provide managed services that use machine learning to improve the functioning of IT systems and support the wider business. Increasingly, cognitive AIOps focuses on automatic detection and prevention, with the ultimate aim of “zero-touch” AIOps.

Conversational AI

Conversational AI surged in the UK during the initial stages of the pandemic as

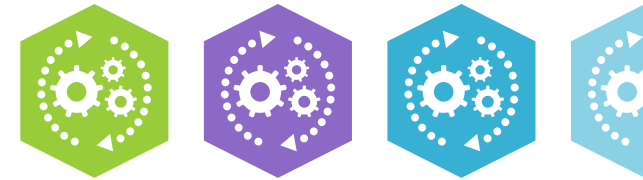
organisations looked to cope with a flood of customer and employee queries. Virtual agents have been deployed by a vast swathe of enterprises and organisations in the UK, including major banks, public broadcasters, consumer goods companies, railway operators, and government departments. However, it is not only large enterprises that are availing of conversational AI solutions. The emergence of software-as-a-service (SaaS) consumption models has opened up low-cost entry solutions for smaller enterprises too. We are also seeing increasing use of omnichannel conversational agents—for example, across text, messaging, and voice—as well as a proliferation of persona- or skill-based virtual agents, for example in HR or IT help desk functions.

Intelligent Document Processing

Within the UK, IDP solutions are now being harnessed by a wide range of enterprises as part of their automation initiatives, including major banks, telecoms companies, and outsourcing providers. Increasingly, these technologies can apply pre-processing and post-processing techniques to correct for skewness, recognise and extract objects and data (e.g., from complex tables embedded in documents), mask or redact data on the fly, create detailed analytics, and support the automation of manual document processes. Such solutions often come with pre-built “skills” for data extraction on particular types of documents, and with low-code features to allow business users to create their own document processing solutions. Some solutions also integrate with multi-functional devices such as mobiles and copiers. With the growing complexity of cross-border trade following Brexit, it can be expected that IDP solutions will play an increasingly important role in areas such as trade facilitation and compliance for UK firms.

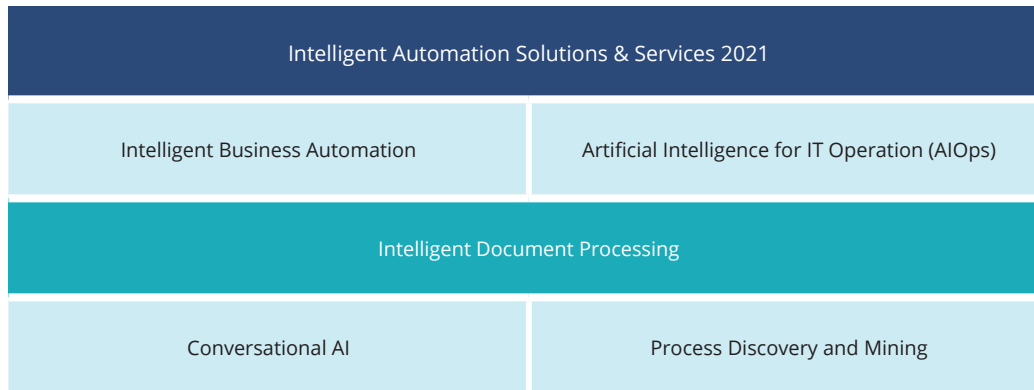
Process Discovery and Mining

Enterprises can only effectively automate processes that they can identify and understand. In the past many efforts to automate processes in organisations foundered because they did not fully understand how processes worked in practice, or because they adopted piecemeal automation solutions that failed to appreciate wider process flows and inter-dependencies across organisational processes. This is now changing through advances in process discovery and mining. Task mining drills down into the user actions, either through bots on the desktop or via computer vision cameras. The advantage of task mining is that it can capture the full set of actions that constitute a process, even those that may non-standard or informal (e.g., use of an excel spreadsheet, or emails, to manage exceptions). Process discovery and mining technologies are now being used by many enterprises within the UK, both public and private, either as part of a managed service automation offering or as a standalone solution.



Introduction

Simplified illustration



Source: ISG 2021

Definition

According to ISG Research, enterprises are improving their automation capabilities, but many are still in the early stages of the automation journeys. Only a small proportion have progressed into enriching their robotic process automation (RPA) with intelligent automation. While RPA can automate simple, rules-based tasks previously performed by humans, it needs structured data as input and can perform only standardized processes. Therefore, the inability to handle unstructured data, a lack of artificial intelligence (AI) capabilities and inadequate in-house skills are driving enterprise clients to look for transformational sourcing options, which include intelligent automation.

Definition (cont.)

Intelligent automation enables software bots to interact with unstructured data and generally includes the following capabilities: image recognition, natural language processing (NLP), cognitive reasoning, and conversational AI. Enterprise clients worldwide are focussing on building intelligent automation capabilities into their RPA initiatives, with the growing need to stay pace with competition with next-generation technologies. Well-orchestrated intelligent automation technologies, combined with rapid improvements in task discovery and process mining technologies, are enabling enterprises to automate processes once considered un-automatable, and deliver higher productivity, reduced costs, improved data accuracy and enhanced customer experiences.

This study on Intelligent Automation Solutions and Services is aimed at understanding enterprise requirements and provider capabilities in meeting these demands.

Scope of the Report

The ISG Provider Lens™ study offers IT and business decision makers:

- A differentiated positioning of providers/vendors based on competitive strengths and portfolio attractive-ness
- A perspective on the UK market for intelligent automation services and solutions

Our study serves as an important decision-making basis for positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate current vendor relationships and potential engagements.

For this reason, ISG's report on intelligent automation is composed of multiple quadrants covering the spectrum of solutions and services that an enterprise client requires.

The quadrants descriptions are as follows:

Intelligent Business Automation: This quadrant analyses providers of IT outsourcing or business process outsourcing (BPO) services that offer proprietary automation and AI platforms, solutions and frameworks. They also provide associated services that enable enterprises to automate business activities and augment the capabilities of their respective workforce.

Definition (cont.)

Artificial Intelligence for IT Operations (AIOps): This quadrant analyses IT service providers that offer proprietary AIOps solutions, platforms and frameworks. They also enable companies with distributed IT infrastructure observability, help them learn IT behaviour under dynamic conditions, and orchestrate workflows for automated corrections.

Conversational AI: This quadrant covers providers that offer conversational AI solutions to foster a development environment and an application programming interface (API) for automated conversational agents. These solutions integrate with chat interfaces such as messaging platforms and social media platforms, allowing third-party extensions and customisations. Conversational AI solutions interact with users through text or voice akin to humans. These applications run on programmable commands and AI technologies and are commonly classified as chatbots and virtual assistants.

Intelligent Document Processing: This quadrant focuses on providers that offer proprietary software products or solutions for the automated discovery, analysis and processing of documents across an enterprise. Going beyond traditional optical character recognition (OCM), intelligent document processing (IDP) software uses AI technologies such as natural language processing (NLP), machine learning (ML), computer vision and deep learning to filter and analyse large volumes of unstructured data from multiple formats such as email, PDFs, Excel, Word or images for further processing, storage and use in other applications.

Process Discovery and Mining: This quadrant evaluates providers that offer proprietary software platforms, tools and associated services to help clients automatically discover, monitor and improve real-time processes from event logs and user interactions.

Provider Classifications

The provider position reflects the suitability of IT providers for a defined market segment (quadrant). Without further additions, the position always applies to all company sizes classes and industries. In case the IT service requirements from enterprise customers differ and the spectrum of IT providers operating in the local market is sufficiently wide, a further differentiation of the IT providers by performance is made according to the target group for products and services. In doing so, ISG either considers the industry requirements or the number of employees, as well as the corporate structures of customers and positions IT providers according to their focus area. As a result, ISG differentiates them, if necessary, into two client target groups that are defined as follows:

- **Midmarket:** Companies with 100 to 4,999 employees or revenues between US\$20 million and US\$999 million with central headquarters in the respective country, usually privately owned.
- **Large Accounts:** Multinational companies with more than 5,000 employees or revenue above US\$1 billion, with activities worldwide and globally distributed decision-making structures.

Provider Classifications

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product & Market Challenger and Contender), and the providers are positioned accordingly.

Leader

Leaders have a comprehensive product and service offering, a strong market presence and established competitive position. The product portfolios and competitive strategies of Leaders are strongly positioned to win business in the markets covered by the study. The Leaders also represent innovative strength and competitive stability.

Product Challenger

Product Challengers offer a product and service portfolio that reflect excellent service and technology stacks. These providers and vendors deliver an unmatched broad and deep range of capabilities. They show evidence of investing to enhance their market presence and competitive strengths.

Market Challenger

Market Challengers have a strong presence in the market and offer a significant edge over other vendors and providers based on competitive strength. Often, Market Challengers are the established and well-known vendors in the regions or vertical markets covered in the study.

Contender

Contenders offer services and products meeting the evaluation criteria that qualifies them to be included in the IPL quadrant. These promising service providers or vendors show evidence of rapidly investing in both products and services and a sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) which ISG believes has strong potential to move into the Leader quadrant. This type of provider can be classified as a Rising Star. Number of providers in each quadrant: ISG rates and positions the most relevant providers according to the scope of the report for each quadrant and limits the maximum of providers per quadrant to 25 (exceptions are possible).

Rising Star

Rising Stars have promising portfolios or the market experience to become a Leader, including the required roadmap and adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market in the studied region. These vendors and service providers give evidence of significant progress toward their goals in the last 12 months. ISG expects Rising Stars to reach the Leader quadrant within the next 12 to 24 months if they continue their delivery of above-average market impact and strength of innovation.

Not In

The service provider or vendor was not included in this quadrant. Among the possible reasons for this designation: ISG could not obtain enough information to position the company; the company does not provide the relevant service or solution as defined for each quadrant of a study; or the company did not meet the eligibility criteria for the study quadrant. Omission from the quadrant does not imply that the service provider or vendor does not offer or plan to offer this service or solution.

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 1 of 8

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AIOps)	Conversational AI	Intelligent Document Processing	Process Discovery and Mining
[24]7.ai	● Not in	● Not in	● Product Challenger	● Not in	● Not in
ABBYY	● Not in	● Not in	● Not in	● Leader	● Not in
ABBYY Timeline	● Not in	● Not in	● Not in	● Not in	● Leader
Accenture	● Leader	● Leader	● Not in	● Not in	● Not in
Acuvate	● Not in	● Not in	● Rising Star	● Not in	● Not in
Aivo	● Not in	● Not in	● Contender	● Not in	● Not in
Amelia	● Not in	● Not in	● Leader	● Not in	● Not in
AntWorks	● Not in	● Not in	● Not in	● Rising Star	● Not in
Appian	● Not in	● Not in	● Not in	● Not in	● Product Challenger
Apromore	● Not in	● Not in	● Not in	● Not in	● Contender
Artificial Solutions	● Not in	● Not in	● Leader	● Not in	● Not in
Atos	● Leader	● Leader	● Not in	● Not in	● Not in

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 2 of 8

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AIOps)	Conversational AI	Intelligent Document Processing	Process Discovery and Mining
Automation Anywhere	● Not in	● Not in	● Not in	● Leader	● Not in
Avaamo	● Not in	● Not in	● Contender	● Not in	● Not in
AWS	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Birlasoft	● Contender	● Not in	● Not in	● Not in	● Not in
BIS (Grooper)	● Not in	● Not in	● Not in	● Contender	● Not in
BusinessOptix	● Not in	● Not in	● Not in	● Not in	● Contender
Capgemini	● Leader	● Leader	● Not in	● Not in	● Not in
Capita	● Market Challenger	● Not in	● Not in	● Not in	● Not in
Celaton	● Not in	● Not in	● Not in	● Product Challenger	● Not in
Celonis	● Not in	● Not in	● Not in	● Not in	● Leader
Cognigy	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Cognizant	● Leader	● Product Challenger	● Not in	● Not in	● Not in

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 3 of 8

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AIOps)	Conversational AI	Intelligent Document Processing	Process Discovery and Mining
Creative Virtual	● Not in	● Not in	● Leader	● Not in	● Not in
CSS Corp	● Contender	● Contender	● Not in	● Not in	● Not in
Datamatics	● Product Challenger	● Not in	● Not in	● Contender	● Not in
Druid	● Not in	● Not in	● Product Challenger	● Not in	● Not in
DXC	● Product Challenger	● Product Challenger	● Not in	● Not in	● Not in
eGain	● Not in	● Not in	● Contender	● Not in	● Not in
Epiance	● Not in	● Not in	● Not in	● Not in	● Contender
Everflow	● Not in	● Not in	● Not in	● Not in	● Contender
Exela	● Product Challenger	● Not in	● Not in	● Not in	● Not in
EXL	● Product Challenger	● Not in	● Not in	● Not in	● Not in
FortressIQ	● Not in	● Not in	● Not in	● Not in	● Rising Star
Fujitsu	● Market Challenger	● Market Challenger	● Not in	● Not in	● Not in

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 4 of 8

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AIOps)	Conversational AI	Intelligent Document Processing	Process Discovery and Mining
GAVS	● Not in	● Contender	● Not in	● Not in	● Not in
Genpact	● Leader	● Not in	● Not in	● Not in	● Not in
Google	● Not in	● Not in	● Leader	● Not in	● Not in
HCL	● Leader	● Leader	● Not in	● Product Challenger	● Not in
Hexaware	● Leader	● Leader	● Not in	● Not in	● Not in
Hyperscience	● Not in	● Not in	● Not in	● Contender	● Not in
i3systems	● Not in	● Not in	● Not in	● Contender	● Not in
IBM	● Leader	● Leader	● Product Challenger	● Not in	● Not in
IBM myInvenio	● Not in	● Not in	● Not in	● Not in	● Product Challenger
Inbenta	● Not in	● Not in	● Contender	● Not in	● Not in
Infosys	● Leader	● Leader	● Not in	● Not in	● Not in
Infrd	● Not in	● Not in	● Not in	● Contender	● Not in

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 5 of 8

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AIOps)	Conversational AI	Intelligent Document Processing	Process Discovery and Mining
ITyX	● Not in	● Not in	● Not in	● Contender	● Not in
Kofax	● Not in	● Not in	● Not in	● Leader	● Not in
Kore.ai	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Kryon	● Not in	● Not in	● Not in	● Not in	● Product Challenger
Livejourney	● Not in	● Not in	● Not in	● Not in	● Contender
LivePerson	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Logpickr	● Not in	● Not in	● Not in	● Not in	● Contender
LTI	● Product Challenger	● Rising Star	● Not in	● Not in	● Not in
LTI Fosfor	● Not in	● Not in	● Not in	● Product Challenger	● Not in
MEHRWERK	● Not in	● Not in	● Not in	● Not in	● Contender
Microland	● Not in	● Contender	● Not in	● Not in	● Not in
Microsoft	● Not in	● Not in	● Leader	● Not in	● Not in

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 6 of 8

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AIOps)	Conversational AI	Intelligent Document Processing	Process Discovery and Mining
Mindtree	● Not in	● Product Challenger	● Not in	● Not in	● Not in
Minit	● Not in	● Not in	● Not in	● Not in	● Leader
Mphasis	● Product Challenger	● Contender	● Not in	● Not in	● Not in
NTT DATA	● Market Challenger	● Market Challenger	● Not in	● Not in	● Not in
OneReach.ai	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Openstream	● Not in	● Not in	● Product Challenger	● Not in	● Not in
PAFnow	● Not in	● Not in	● Not in	● Not in	● Contender
Parascript	● Not in	● Not in	● Not in	● Contender	● Not in
Persistent	● Contender	● Not in	● Not in	● Not in	● Not in
Pypestream	● Not in	● Not in	● Product Challenger	● Not in	● Not in
qBotica	● Not in	● Not in	● Not in	● Contender	● Not in
QPR Software	● Not in	● Not in	● Not in	● Not in	● Rising Star

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 7 of 8

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AIOps)	Conversational AI	Intelligent Document Processing	Process Discovery and Mining
Rezolve.ai	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Rossum	● Not in	● Not in	● Not in	● Product Challenger	● Not in
SAP Signavio	● Not in	● Not in	● Not in	● Not in	● Leader
Sinch Chatlayer	● Not in	● Not in	● Product Challenger	● Not in	● Not in
Singularity Systems	● Not in	● Not in	● Not in	● Contender	● Not in
Softtek	● Product Challenger	● Not in	● Not in	● Not in	● Not in
Software AG	● Not in	● Not in	● Not in	● Not in	● Product Challenger
Sonata Software	● Contender	● Not in	● Not in	● Not in	● Not in
Soroco	● Not in	● Not in	● Not in	● Not in	● Rising Star
Straive	● Not in	● Not in	● Not in	● Contender	● Not in
TCS	● Leader	● Leader	● Not in	● Not in	● Not in
Tech Mahindra	● Product Challenger	● Product Challenger	● Not in	● Not in	● Not in

Intelligent Automation - Solutions and Services - Quadrant Provider Listing 8 of 8

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AIOps)	Conversational AI	Intelligent Document Processing	Process Discovery and Mining
UiPath	● Not in	● Not in	● Not in	● Product Challenger	● Leader
UpFlux	● Not in	● Not in	● Not in	● Not in	● Contender
UST	● Product Challenger	● Contender	● Not in	● Not in	● Not in
UST SmartOps	● Not in	● Not in	● Not in	● Market Challenger	● Not in
Visualyze.AI	● Not in	● Not in	● Not in	● Contender	● Not in
Wipro	● Leader	● Leader	● Not in	● Not in	● Not in
WNS	● Rising Star	● Not in	● Not in	● Not in	● Not in
WorkFusion	● Not in	● Not in	● Not in	● Product Challenger	● Not in
Zensar	● Not in	● Contender	● Not in	● Not in	● Not in



Intelligent Automation – Solutions and Services Quadrants

ENTERPRISE CONTEXT

Artificial Intelligence for IT Operations (AIOps)

This report is relevant to enterprises across industries in the U.K. for evaluating service providers that offer proprietary solutions in artificial intelligence for IT operations (AIOps).

In this quadrant report, ISG highlights the current market positioning of providers that offer proprietary offerings for AIOps in the U.K., based on the depth of their service offerings and market presence.

The demand for AIOps solutions in the U.K. has been driven by the increasing scale and complexity of IT systems, often spanning on-premises, cloud and hybrid systems. A particular challenge is tool sprawl, with the presence of multiple observability tools giving rise to large volumes of alerts and false positives, necessitating reactive problem solving and diverting scarce IT resources away from more productive tasks. Within this context, AIOps plays a key role in helping the U.K. enterprises increase the signal-to-noise ratio within their IT networks.

With the COVID-19, the need for AIOps has increased even more, resulting in a huge shift of resources to online consumption and remote working, an increase in demand for network resources, and rise in demand for cloud computing.

Service providers are offering a range of solutions and services, including automation journey planning, machine learning-based predictive ticketing, automatic triaging, root-cause analysis, event correlation, conversational AI agents, and bots that can perform self-healing operations on IT systems and applications.

Who should read the report:

Chief information officers (CIOs) should read this report to understand the relative positioning and capabilities of providers that can help them effectively plan and improve the reliability and availability of their digital transformation initiatives.

Chief strategy officers (CSOs), through this report, will gain knowledge on providers' product portfolio capabilities, which, in turn, will enable streamlined workflow for enterprises and enhanced business process.

Chief technology officers (CTOs) should read this report to understand how AIOps platform providers offer transformation initiatives and perform in complex environments to achieve smoother operations.

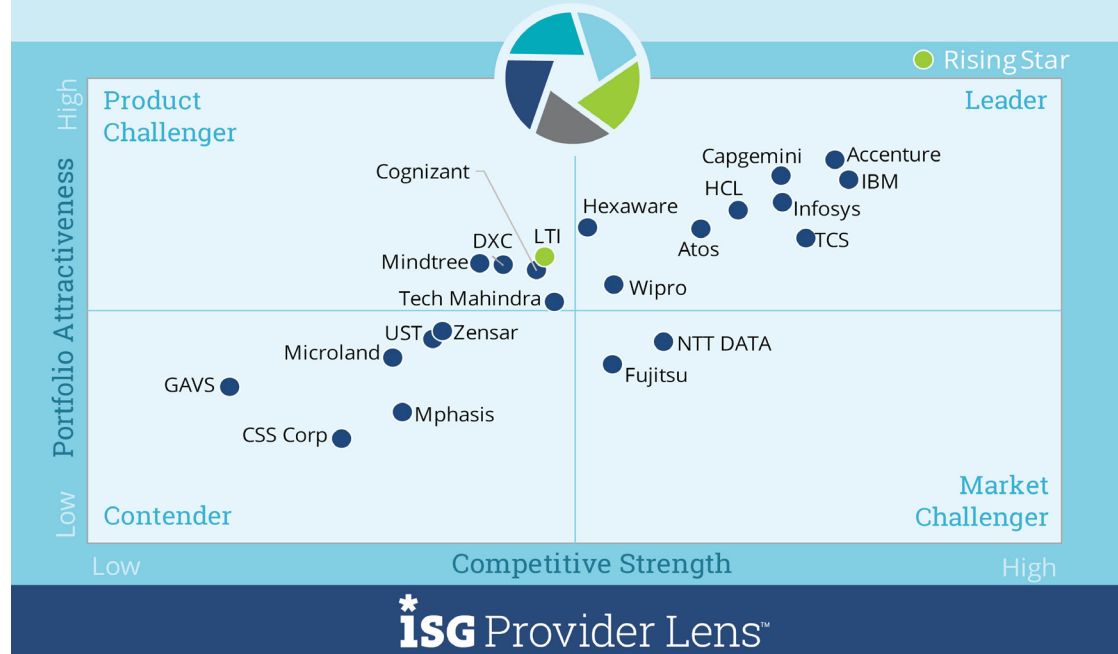
ARTIFICIAL INTELLIGENCE FOR IT OPERATIONS (AIOPS)

Definition

This quadrant analyses IT service providers that offer proprietary AIOps solutions, platforms and frameworks; enable companies with distributed IT infrastructure observability; learn IT behaviour under dynamic conditions; and orchestrate workflows for automated corrections. AIOps is the ability of an automation-as-a-service solution and framework to identify the state of a company's multi-cloud IT workload and analyse the data ascertained to facilitate automated operations. AIOps also offer real-time, minimal cost solutions that allow companies to detect issues before they can have an adverse effect on business. Such solutions and frameworks redefine the model of IT operation by combining data patterns and human intelligence to provide full visibility into the IT landscape of an enterprise. These are aimed at maximizing the performance of distributed, heterogeneous, multi-cloud IT workloads, reducing costs and ensuring compliance and security.

Intelligent Automation - Solutions & Services
Artificial Intelligence for IT Operation (AIOps)

2021
U.K.



DISCLAIMER: ISG Automation and other standalone intelligent automation players are not considered in this quadrant.

Source: ISG Research 2021

ARTIFICIAL INTELLIGENCE FOR IT OPERATIONS (AIOps)

Eligibility Criteria

- Must have proprietary AIOps platform and framework
- Enable companies with highly scalable, real-time data, along with prescriptive and proactive analysis to bring visibility to IT landscape
- Must offer AIOps platforms that are able to ingest data-at-rest and data-in-motion, and create patterns for auto-remediation
- Ability to offer data injection through multiple sources, and provide automated pattern discovery and detection through the big data platform
- Ability to improve resilience and reduce mean time to repair (MTTR) through automation services
- Ability to act as a smart orchestration engine in workflow creation for managed companies' IT infrastructure with nearly zero- and one-touch approach
- Ability to offer out-of-the box APIs, multi-tenancy and secure deployment of platform

Note 1: This quadrant encompasses Automation-as-a-Service solutions, platforms/ecosystem/frameworks developed by IT service providers by investing in AI, machine learning (ML) and bigdata capabilities to help companies ensure that their multi-cloud workload operation can be supported in autonomous way.

Note 2: Under proprietary solution we understand a solution built or grown under own effort, assembled of products and services, that might be open source or under commercial license but not predominantly tied to a specific vendor.

DISCLAIMER: ISG Automation and other standalone intelligent automation players are not considered in this quadrant.

ARTIFICIAL INTELLIGENCE FOR IT OPERATIONS (AIOps)

Observations

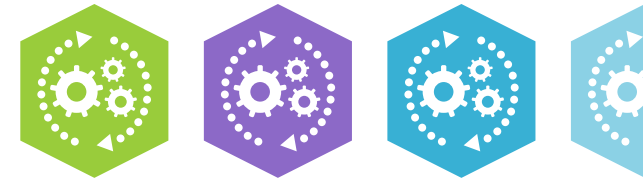
In this quadrant, we evaluated 22 providers, of which nine are Leaders and 1 is a Rising Star.

- **Accenture** has launched a new edition of its myWizard platform, adding new features such as automation journey planning and modern software quality engineering.
- **Atos** is emphasising predictive ticketing and zero-touch operations, as well as investing in Atos Bridge, a platform that provides real-time insights on business performance across the application and infrastructure stack.
- **Capgemini** is expanding its automation-focussed roles, as well as helping clients to upgrade their AIOps talent through a mix of functional and technical training, hands-on lab experience and business influencer training.
- **HCL** is continuing to focus on incorporating new machine learning and natural language processing (NLP) capabilities into its AIOps suite of solutions, while also investing in bespoke in-house training on machine learning for specific IT roles within the organisation.
- **Hexaware**, a Rising Star in last year's report, marches firmly into the leader quadrant this year through its investments in Tensai™, a highly modular yet integrated platform for AI-powered automation of the enterprise IT stack.
- **IBM** continues to heavily leverage the capabilities of its Watson AI Ops and Cloud Pak® data solution, and is investing significantly in new AIOps practitioners, particularly in the process mining area through a partnership with Celonis. It has also recently acquired myInvenio, a process mining software company based in Italy.
- **Infosys** has significantly revamped its AIOps suite of solution and services over the last 12 months. It introduced Live Enterprise Application Platform (LEAP), the Infosys Polycloud for AI-enabled cloud management and the Infosys Cognitive Automation Studio among other initiatives.

ARTIFICIAL INTELLIGENCE FOR IT OPERATIONS (AIOps)

Observations (cont.)

- **TCS** is taking a holistic approach to AIOps with its Machine First Delivery Model (MFDM)™ that is focussed on large-scale automation of enterprise IT processes. It is also continuing to invest significantly in partnerships for AIOps with third-party networks, cloud providers and software vendors.
- **Wipro** is emphasising its Business Experience Enrichment (BEE) model for assessing and rationalising AIOps tools. It has also developed the HOLMES™ Conversation AI Studio to enable collaboration across diverse IT functional teams.
- **LTI** has been identified as a Rising Star, bringing a strong consulting flavour to its AIOps operations and making significant investments in people, technology, methodologies and processes.



ACCENTURE

Overview

Accenture is a publicly listed global service provider, offering consulting, technology and outsourcing services. Headquartered in Dublin, Ireland, the company serves approximately 91 of the Fortune Global 100 companies and more than three quarters of the Fortune Global 500. It has about 569,000 employees worldwide. Accenture has a strong presence in the region, with approximately 10,000 employees in six offices, including Edinburgh, London, Newcastle and Manchester. Accenture delivers AIOps capabilities primarily through the proprietary myWizard® platform. The UK accounts for a major portion of its IT automation services revenue.

Strengths

Integrated AIOps platform: With the aim of making IT operations more intelligent, agile and efficient, Accenture myWizard® brings a veritable magician's toolkit to its AIOps offering, incorporating features such as virtual agents for automated alerts, and data-driven tools for automating the software delivery cycle and DevOps processes. It also offers tools for automating the journey to the cloud and cloud-native operations. In September 2020, the company launched a new generation of myWizard, adding new capabilities such as enterprise automation journey management and modern software quality engineering.

Built for scale: Accenture's AIOps offerings are built for scale, with more than 100,000 active users spread across 1,500 clients globally and 67,000 tickets managed per day. These are backed by extensive assets, including over 150 patents and applications, and more than 14,000 automation specialists globally.

Strong focus on business outcomes: Given its work with the world's largest enterprises and its parallel focus on consulting, Accenture's automation solutions tend to be laser focussed on delivering tangible business outcomes. A case in point is Accenture's AIOps work for a global retailer, where myWizard® was deployed to 330 use cases over 18 months, helping the client reduce IT incident tickets by 193,000 and saving \$2 million in operating expenses.

Caution

Accenture tends to target large enterprises, which may reduce its appeal and affordability to midmarket companies. It should focus on showcasing its AIOps capabilities more widely in the UK through a wider range of case studies and marketing collateral.



2021 ISG Provider Lens™ Leader

With a recently launched new generation of myWizard®, backed by an extensive range of proprietary AI assets and capabilities, Accenture remains a leader in the AIOps field for enterprises in the UK.

ATOS

Overview

Atos, a publicly listed company headquartered in Paris, provides digital solutions and consultancy services. It has approximately 105,000 employees in 71 countries worldwide and generates about 70 percent of its revenues from Europe. Atos delivers AIOps services primarily through its SyntBots platform, a suite of AI, data science and automation tools that help optimise IT operations, site reliability engineering (SRE), and DevOps. The services are supported by 22 delivery centres globally, with a global centre/innovation lab in London. Atos has approximately 70 full-time employees (FTEs) in the UK and Nordics. About 60 percent of its AIOps revenues in the UK comes from the midmarket.

Strengths

Intelligent, low-touch operations: Spurred by a vision to make IT operations always-on, autonomous, and self-healing, Atos SyntBots comes with a raft of machine learning features for automatic triaging and prioritisation of events. The AI engine can match new incidents to previously resolved events, notify relevant teams and trigger auto-remediations solutions if they are available. The SyntBots platform also integrates with a wide array of third-party monitoring and management tools.

Flexibility in service and pricing models: Atos' AIOps solutions are available either as part of an overall managed service agreement (based on guaranteed efficiency gains) or as a discrete automation-as-a-service package for new clients that do not have a managed service agreement in place. It offers various pricing models such as outcome-based, fixed price and time and materials.

Strong industry traction: Atos has extensive experience in using AIOps solutions to drive tangible business outcomes for clients. The company deployed the SyntBots solution to help a UK-based insurance company whose IT estate had expanded (through various mergers) to encompass more than 17 different enterprise IT systems and a variety of inconsistent processes and delivery models. By deploying its SyntBots AIOps tools, Atos was able to map more than 2,500 workflows supported by more than 1,700 FTEs, developing a strategy for consolidating and standardising global IT support. This resulted in a 40 percent reduction in mean time to resolution (MTTR) and \$22.8 million in IT cost savings.

Caution

Atos' AIOps has a strong focus on manufacturing, financial services, healthcare and life sciences sectors. It should continue its planned expansion to other verticals such as retail and logistics.



2021 ISG Provider Lens™ Leader

Guided by its mission of intelligent, self-healing IT operations, and armed with a powerful array of proprietary AI tools and solutions, Atos remains a leader in the UK for AIOps.

CAPGEMINI

Overview

Capgemini is a global company with three major business lines covering strategy and business transformation, applications and technology, and engineering and operations. Headquartered in Paris, it has more than 270,000 employees in nearly 50 countries. It principally serves large enterprises (with more than \$5 billion annual revenue). Capgemini has more than 200 FTEs devoted to AIOps in the UK and earns about 14 percent of its AIOps revenues from that market. About 60 percent of its AIOps clients are in Europe, including the UK and Nordics. Capgemini has multiple delivery centres that are focussed on intelligent business automation and AIOps in these regions

Strengths

Comprehensive AIOps managed services: Capgemini delivers its AIOps solutions through DigiOPs, a comprehensive suite of managed services covering the full lifecycle of IT automation including strategy and roadmap creation, automation feasibility assessment, centre of excellence, factory model setup, running of hyper-automation services, and AIOps change management and continuous service improvement. These are underpinned by its homegrown Capgemini Intelligent Automation Platform (CIAP), which includes features such as intelligent alerting of IT anomalies and correlation analysis to find connections between incidents, reduce noise, and enable self-remediation of incidents.

Extensive partner ecosystem: Capgemini's AIOps solutions benefit from an extensive range of partnerships with different vendors, including IT monitoring (Zabbix and Splunk), observability tools (Dynatrace, App Dynamics), conversational AI (Amelia IPSoft), RPA (Blue Prism, Automation Anywhere, UiPath), and reporting tools (Tableau).

Strong industry traction: Capgemini has a strong focus on business outcomes, delivering AIOps solutions for large, blue-chip clients across the world. Within the UK, it has provided AIOps for an international airport with capabilities such as real-time business transaction monitoring across infrastructure and automated self-service and self-healing for IT challenges.

Caution

Capgemini's AIOps capabilities are heavily focussed on large enterprises. It should also consider developing AIOps services that may be more suitable for midsized enterprises.



2021 ISG Provider Lens™ Leader

With an extensive suite of homegrown AI-powered automation solutions and extensive experience in serving the world's largest enterprises, Capgemini is a leader in the UK AIOps space.

HCL

 Overview

HCL Technologies (HCL) is a large multinational IT service provider headquartered in Noida, India. It primarily targets large enterprises (above \$5 billion in revenues) and the midmarket (\$1 billion–\$5 billion in revenues). The company has a considerable FTE base devoted to AIOps in the UK, of which 70 percent are focussed on product development. HCL DRYICE™ is an integrated AI-led service assurance platform that can simplify and transform enterprise IT operations.

 Strengths

Comprehensive portfolio: The HCL DRYICE™ software portfolio covers a vast spectrum of automation products (such as DRYICE™ Lucy, an AI-enabled virtual assistant), service orchestration tools, AIOps platforms, and digital workplace and business process observability solutions. These are typically a mixture of home-grown proprietary tools and third-party solutions.

Unified reporting and analytics: HCL AIOps has a unified reporting dashboard that covers a wide range of business, service management and application performance metrics across the IT stack. The dashboard provides customised, role-based views for different decision makers, and a range of predictive analytics. HCL's IONA Platform also helps to simplify activities across applications, infrastructure and business processes, providing a 360-degree view of data and events.

Thought leadership: HCL has a long tradition of thought leadership in the AIOps field. It has published a series of manuals and white papers on topics such as infrastructure-as-code automation, cloud capacity management, cloud automation and microservices and containerisation.

Deep industry traction: HCL has a sizable client base for its AIOps solutions in the UK. It has many blue-chip clients such as SGN, BP and Anglo American. It has provided cloud management and automation solutions for a British multinational insurance company, reducing the provisioning time across the IT estate from more than 15 days compared to fewer than 3 days, while also speeding up the resolution of incidents. As part of an infrastructure and application migration project, the company developed fully automated DevOps solutions for a major gas distribution company in the region.

 Caution

While HCL AIOps leverages third-party and in-house products for monitoring and observability, it should continue to develop more of its solutions in this area. It should also consider introducing more vertical industry AIOps solutions and services.



2021 ISG Provider Lens™ Leader

With a comprehensive portfolio of home-grown and third-party tools as well as deep industry traction with leading enterprises in the UK, HCL remains a formidable leader in the UK AIOps market.

HEXAWARE

Overview

Founded in 1990, Hexaware Technologies is a global IT consulting and digital solution service provider. Headquartered in Mumbai, India, it has approximately 19,833 employees globally and 37 offices across the world. It has 26 delivery centres globally, including five in Europe, the Middle East and Africa. In the UK, the company is headquartered in London. Hexaware has FTEs dedicated to AIOps in the UK, and generates about a fifth of its global AIOps revenues from the region. It delivers AIOps primarily through its Tensai™ intelligent automation platform.

Strengths

Range of AIOps platforms: Hexaware's Tensai™ platform is available in different versions, designed to automate different aspects of an enterprise's IT operations. For example, Tensai™ AIOps is an AI-powered framework for automating application and maintenance across the IT stack; Tensai Release automates the application release cycle; and Tensai™ Assurance is focussed on autonomous testing of applications and services.

Composable, open-source architecture: For enterprise clients that are worried about future technical debt or technology lock-in, a key attraction of the Tensai™ for AIOps platform is its modular design built on open-source or open-standard tools. This also means that clients need to only choose the components they need and can benefit from the best-of-breed tools in the market.

Choice of engagement models: Enterprise clients can access Hexaware's Tensai™ for AIOps via three different engagement models—managed service based on SLAs, charging based on discrete automation opportunities, and automation as-a-service with outcome-based pricing.

Industry traction: Hexaware has delivered AIOps solutions for many blue-chip clients, including a well-known auction house in the UK. Its AIOps for this client resulted in a 24 percent reduction in alert noise, a reduction in false-positive alerts by 50 percent, and a reduction in mean time to resolution (MTTR) of 20 percent.

Caution

Hexaware should accelerate its plans to move towards actionable and zero-touch IT operations, for example, by increasing its use of machine learning algorithms and context-aware bots for incident resolution.



2021 ISG Provider Lens™ Leader

With its highly modular, open-source architecture and variety of platforms and engagement models, Hexaware has become a Leader in the UK AIOps space.

IBM

 Overview

IBM is a publicly listed global IT service provider, headquartered in New York, U.S. It has approximately 40,000 FTEs globally that are engaged in intelligent automation activities. It serves clients through 20 major automation delivery centres located in seven countries. IBM has a long history of AIOps development, successfully deploying automation to more than 1,000 clients and across more than 500,000 servers. IBM's AIOps business has a strong client base in financial services, the public sector and the healthcare and pharmaceuticals industries, although it also serves other industries. IBM generates about 10 percent of its automation revenue from the UK.

 Strengths

Deep AI expertise: Within AIOps, IBM delivers its service primarily through its Watson AI Ops, Chat Ops and Cloud Pak solution suites. In contrast to the traditional focus of IT observability on structured data such as events, topology and metrics, the focus of Watson is on deciphering unstructured data, derived from sources such as logs, tickets, collaboration tools and social media. This approach means that data can be harvested and analysed across data silos and across the IT lifecycle. It also facilitates improved interpretation as signals and alerts can be correlated to identify patterns and root causes of problems in IT operations.

Investment in AI talent: IBM continues to strengthen its practitioner base in IBM Watson AI Ops, Chat Ops and the Cloud Pak suite. It is also expanding its processing mining capabilities, training more than 100 IBM practitioners for certification on Celonis, following a recent partnership with the latter.

Compelling case studies: IBM has helped multiple large clients with AI-driven IT transformation, including a multinational consumer goods company, which was able to achieve a 40 percent reduction in IT incidents and a 22 percent productivity gain from extreme automation across all layers of the IT stack. Using the Red Hat Ansible automation platform, IBM also helped the British Army to improve its IT infrastructure, serving 19,000 personnel across 27 countries, improving consistency of the service and speeding up deployment of critical patches from three days to three hours.

 Caution

We have not been able to assess IBM's pricing models, which may be a factor of relevance for midsize and small enterprises. Given its depth of AIOps expertise, IBM could widely showcase its AIOps solutions and assets in the UK through more case studies and marketing collaterals.



2021 ISG Provider Lens™ Leader

With a powerful suite of AIOps solutions, backed by a strong talent base and repository of AI assets, IBM remains a Leader in the UK AIOps space.

INFOSYS

Overview

Infosys is a publicly listed global company, offering consulting, technology, outsourcing and next-generation digital solutions and services. It has approximately 1,600 clients in more than 50 countries, and over 260,000 employees worldwide. Its AIOps practice has a strong presence in the financial services industry, followed by manufacturing and healthcare. It primarily serves large enterprises and the midmarket. Globally, Infosys has approximately 14,500 FTEs dedicated to its AIOps offerings. About one fifth (21 percent) of its AIOps clients are in the UK.

Strengths

Comprehensive AIOps: Spurred by its vision of creating “the live enterprise,” Infosys provides a broad sweep of AIOps services and proprietary products via its Live Enterprise Application Platform (LEAP) suite of automation tools and services. These cover cognitive AI, site reliability engineering services, observability services, knowledge graphs, gamification tools, cognitive automation bots and AI virtual agents. LEAP continuously scans the IT stack and the entire business value chain to pinpoint failures and vulnerabilities to take corrective action.

Single-pane-of-glass view: The Infosys Polycloud platform aims to provide a single and unified view for IT and business decision makers across the enterprise IT stack. The platform draws on a variety of AI-powered tools to reduce noise in IT systems and streamline and automate their operations.

Reusable assets: Enterprise clients can benefit from Infosys’ vast repository of more than 11,800 reusable bots (part of the Cognitive Automation Studio), more than 15 AI cloud models, and more than 100 AI cloud datasets.

UK business traction: Infosys has delivered AIOps solutions and services for some of the biggest companies in the UK and Ireland, including a multinational oil and gas company, a multinational telecommunications holding company, and one of the largest commercial banks in Ireland. For a major multinational oil and gas company in the UK, it created a next-generation application management strategy with significant elements of self service and 100 percent automation, generating \$12.8 million worth in total cost of ownership reductions with full regulatory compliance.

Caution

Infosys’ AIOps solutions are largely industry agnostic. It should consider developing more industry-tailored solutions given that certain industries may have specific needs related to their IT operations (for example, compliance or regulatory reasons).



2021 ISG Provider Lens™ Leader

With its comprehensive suite of AIOps solutions and services, vast repository of reusable assets, and deep industry experience, Infosys remains a leader in the UK for AIOps.

TCS

 Overview

Tata Consultancy Services (TCS) is a global IT services, consulting and business solutions organisation, headquartered in Mumbai, India. It has a global workforce of approximately 529,000 professionals and a presence in 46 countries. Its global delivery network spans 76 locations outside India, with 18 delivery centres located in the UK and Ireland and six in wider Europe. Its AIOps solutions and services are delivered via its ignio™ suite of tools, including ignio™ AIOps and ignio™ ERPOps. In the UK, the company has a strong presence in the banking, financial services and insurance industries, followed by the retail and telecom sectors.

 Strengths

Enterprise-wide view of AIOps: TCS takes a broad enterprise-wide view of the AIOps solution space, offering an array of AIOps solutions and services within its ignio™ suite, ranging from AIOps for infrastructure and applications and digital workplace solutions, to automation solutions for enterprise resource planning (ERP) and omnichannel conversational AI solutions. Enterprise clients can therefore benefit from holistic, enterprise-wide solutions that are tied to tangible business outcomes,

Extensive partnerships: TCS's AIOps offerings are embedded within a rich ecosystem of partnerships covering infrastructure (hyperscale cloud providers, HPE, Intel, NVIDIA, among others), application providers (Dynatrace, Splunk, IBM Watson, and others), digital workplace software providers, and networks (Cisco, Citrix, FatPipe, and more).

Compelling case studies: TCS has deployed its MFDM™ (Machine-First Delivery Model) to drive IT-related business benefits for a range of large enterprise clients. For a U.S.-headquartered retail pharmacy chain, it integrated 11 data sources across the IT estate with AIOps to process more than 25,000 IT alerts, per month, and resolve over 17,500 tickets per month, resulting in a 96 percent reduction in MTTR and eliminating 20,000 hours of manual effort, per month.

 Caution

TCS' AIOps solutions tend to target major enterprise transformations for large companies. It should consider developing more modular AIOps offerings, suitable for the midmarket.



2021 ISG Provider Lens™ Leader

With a wide array of enterprise wide AIOps solutions, an extensive partner network and experience of delivering large-scale IT automation for major enterprises, TCS remains a leader in the AIOps space in the UK.

WIPRO

Overview

Wipro is a publicly listed global technology services company with approximately 209,890 employees. Based in India, it had an FY21 revenue of \$8.1 billion. About 30 percent of its overall revenue comes from Europe. It has employees in 66 countries and serves enterprise clients across 27 industry segments. Wipro has a strong market presence in the UK, with headquarters in central London and 10 development centres and four digital pods across England and Scotland. It has worked with numerous FTSE 100 and 250 companies since it entered the UK in 1995. Wipro has approximately 4,400 employees across the UK and Ireland. It provides a range of AIOps services and automation tools, primarily through the Wipro HOLMES platform.

Strengths

Single platform: Wipro believes that enterprise clients want to reduce the complexity arising from the use of multiple tools, and ultimately regain control over their enterprise stack. Its Business Experience Enrichment (BEE) model provides a unified framework for assessing and rationalising AIOps tools, monitoring business alerts, identifying root causes of problems through machine learning, and enabling intelligent remediation and ultimately business process improvements. The aim is to move from low-touch IT operations towards zero-touch automation. Monitoring, AI-driven insight and intelligent remediation are delivered primarily through Wipro's proprietary HOLMES platform.

AIOps services: Wipro provides a wide range of design, consulting and implementation services to complement its AIOps tools and platforms. These services are likely to be particularly appealing to both enterprises embarking on large-scale IT transformation projects and those that are new to the AIOps field and need to identify the right processes for automation.

Industry traction: Wipro has delivered AIOps solutions to a variety of large enterprises worldwide. For a large multinational European conglomerate, with a multi-vendor IT support landscape, it consolidated application performance management (APM) tools, creating AI-powered event correlation and automating orchestration for IT incidents and service requests, thereby ensuring a 35 percent improvement in mean-time-to-resolution.

Caution

Given its focus on large, transformational IT deals, Wipro's services and solutions may appear less accessible to the midmarket. It should consider more targeted AIOps options for this sector.



2021 ISG Provider Lens™ Leader

With a single, unified platform for AI-powered automation, and a rich array of AIOps design and consulting services, Wipro will appeal to many large enterprises seeking to drive transformation in their AIOps operations. It remains a Leader in this space in the UK.

RISING STAR: LTI

Overview

LTI is a global technology consulting and digital solutions company with operations across 31 countries. It has approximately 6,000 automation consultants and 1,200 FTEs dedicated to AIOps solutions and services, globally. It has been rapidly growing and industrialising its AIOps solution and services and now has 105 customers, 2,700 deployed bots, 12 AI point solutions and six innovation labs worldwide. The company delivers AIOps projects through various platforms, including its Mosaic AIOps platform, Canvass XFH and Mosaic Discovery (for pattern discovery in operational data). It has approximately 30 FTEs dedicated to AIOps in the UK and seven major clients that include large, midmarket and small businesses.

Strengths

Strong consulting focus: LTI sees AIOps as a trifecta of people, methodologies and technologies. Its AIOps offering, therefore, involves deep engagement between its AIOps consultants and a client enterprise to understand as-is IT processes, identify opportunities for automation, create the business case and roadmap, and assist with the implementation and ongoing maintenance of the technology solutions proposed.

Platform variety: LTI brings several platforms to its AIOps services. These include LTI Mosaic Monitor of Monitors that uses machine learning to analyse asset telemetry data to monitor an enterprise's IT estate, detect problems and trigger remediation; BRAIO, an intelligent workflow solution for automation of business and IT processes; Mosaic Discovery that uncovers patterns and trends in IT data such as tickets; and Canvas XFH, which is a curated platform of proprietary and third-party automation tools designed to help workers collaborate across locations and functions.

Reusable assets: Clients can benefit from a catalogue of reusable AIOps use cases and assets that speed deployment and ensure day-one benefits of automation. This approach is also likely to appeal to customers that are particularly price-sensitive and do not wish to reinvent the wheel for their AIOps activities. It also has an Automation Factory, a team dedicated to developing automation assets tailored to different technologies.

Caution

LTI's market presence in the UK is still relatively small compared with other regions. It should continue to invest in the region to establish its brand presence to ensure a wider reach for its AIOps services and solutions.

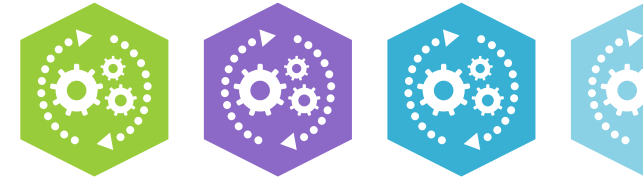


2021 ISG Provider Lens™ Rising Star

LTI brings a strong consulting flavour to its AIOps services and solution, which will appeal to enterprises that are embarking on their automation journey. Its portfolio of AIOps platforms and reusable assets, together, make it a Rising Star for AIOps in the UK.



Methodology



METHODOLOGY

The ISG Provider Lens™ "Intelligent Automation - Solutions and Services" UK 2021 research study analyses the relevant software vendors/service providers in the UK market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of "Intelligent Automation - Solutions and Services" UK 2021 market
2. Use of questionnaire-based surveys of service providers/vendor across all trend topics
3. Interactive discussions with service providers/vendors on capabilities and use cases
4. Use of ISG's internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
 - Strategy & vision
 - Innovation
 - Brand awareness and presence in the market
 - Sales and partner landscape
 - Breadth and depth of portfolio of services offered
 - Technology advancements

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Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor. Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

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