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Intelligent Automation – Solutions & Services

Intelligent Business Automation

U.K. 2021

Quadrant Report

Customized report courtesy of:



A research report comparing provider strengths, challenges and competitive differentiators

December 2021

ISG Provider Lens™ Quadrant Report | 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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ISG Provider Lens[™] Quadrant Report | December 2021 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.

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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, AlOps, 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.

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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.

AlOps

With the shift to online consumption and remote working precipitated by the pandemic, the stakes for AlOps 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 AlOps focuses on automatic detection and prevention, with the ultimate aim of "zero-touch" AlOps.

Conversational AI

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

Executive Summary

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.

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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.





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Introduction

	Simplified illustration						
Intelligent Automation Solutions & Services 2021							
Intelligent Business Automation Artificial Intelligence for IT Operation (AlOps)							
Intelligent Document Processing							
Conversational AI	Process Discovery and Mining						

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 Al. 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.

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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.

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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.

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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^M 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 aboveaverage 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.

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

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AlOps)	Conversational Al	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 (AlOps)	Conversational Al	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 (AlOps)	Conversational Al	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 (AlOps)	Conversational Al	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 mylnvenio	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
Infrrd	Not in	Not in	Not in	Contender	Not in

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

	Intelligent Business Automation	Artificial Intelligence for IT Operation (AlOps)	Conversational Al	Intelligent Document Processing	Process Discovery and Mining
ІТуХ	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 (AlOps)	Conversational Al	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 (AlOps)	Conversational Al	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 Bu Automati		r IT Conversational Al	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 Challe	enger Ocontender	Not in	Not in	Not in
UST SmartOps	Not in	Not in	Not in	Market Challenger	Not in
Visualyze.Al	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

Intelligent Business Automation

The report is relevant to enterprises in the U.K. for evaluating IT and business process outsourcing service providers that offer proprietary intelligent business automation (IBA) solutions and services with allied implementation, consulting and support services.

In this quadrant, ISG highlights the market positioning of IBA service providers in the U.K. and how each provider addresses the challenges faced by enterprises. Enterprises can use the report findings to understand the market dynamics and explore new capabilities with incumbent providers. The report can also help them evaluate new providers to support their intelligent business process automation initiatives.

Despite enterprises still coping with the impacts of COVID-19, the market is witnessing growing adoption of IBA solutions to build technological resilience and cost-efficient operations to meet business imperatives. However, enterprises are facing challenges such as identifying processes to automate, scaling automation, change management, defining metrics to measure ROI, and budgetary constraints.

In the U.K., factors such as labor scarcity, supply chain complexity and rising costs have increased the demand for intelligent automation solutions. Enterprises look to modernize legacy set up and move to a leaner, flexible operating models with hybrid workforces. They also seek providers that can guide and offer long-term and holistic automation strategies rather than tactical-siloed automation approaches.

Service providers typically offer a full automation suite to cater to enterprises automation requirements and domain-specific solutions to expedite time to value. Many of them are leveraging process discovery and mining tools for a comprehensive process assessment, provided as an integral part of an IBA offering. Service providers are also offering cloud-based, automation-as-a-service commercial models to meet budgetary constraints for mid- and small-sized enterprises.

Who should read this report:

Line of business leaders (LOBs) should read this report to understand the relative positioning and capabilities of providers that can deliver end-to-end IBA solutions with higher efficiency and effectiveness.

Digital transformation professionals should read this report to understand how providers of IBA solutions and services fit their digital transformation initiatives and ensure future-proof strategy to blend cognitive tools using AI, machine learning, natural language processing, etc.

IT and technology leaders should read this report to understand how IBA providers integrate the latest technologies and capabilities into their proprietary offerings to gain a competitive edge.

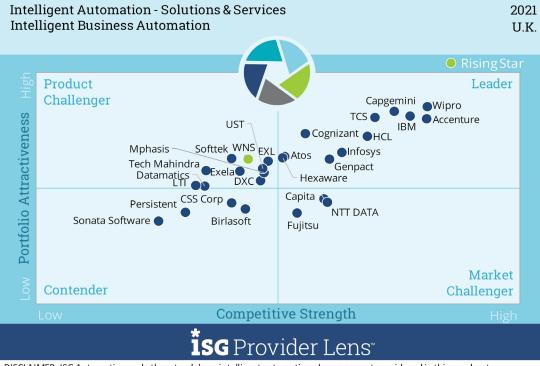
Sourcing, procurement and vendor management professionals should read this report to have a better understanding of the current landscape of IBA service providers in the U.K.



INTELLIGENT BUSINESS AUTOMATION

Definition

This quadrant analyses providers of information technology outsourcing or business process outsourcing services that offer proprietary automation and AI platforms, solutions and frameworks, along with associated services to enable enterprises to automate business activities and augment the capabilities of their respective workforce. These can be implemented in any facet of an enterprise that involve repetitive and manual processes, but are primarily used in finance and accounting, human resources, procurement and supply chain functions. The solutions supplement automation with advanced analytics and AI technologies such as compute vision, machine/deep learning and natural language processing (NLP) to digitally transform enterprise business operations, at scale. They are aimed at eliminating inefficiencies in business operations and pave the way for reduced cost, high productivity, improved data accuracy and enhanced employee and customer experience.



DISCLAIMER: ISG Automation and other standalone intelligent automation players are not considered in this quadrant. Source: ISG Research 2021



INTELLIGENT BUSINESS AUTOMATION

Eligibility Criteria

- Must offer proprietary automation/AI platform and solutions, implement these and provide ongoing support
- Have the ability to foster end-to-end business transformation of enterprises by leveraging next-gen technologies such as automation, Al and advanced analytics
- Have the ability to support integration with various enterprise applications, for example, customer relationship management systems for customer data or enterprise resource planning systems for finance, and existing IT infrastructure
- Capable of offering out-of-the-box application programming interfaces (APIs), multi-tenancy and secure deployment of platform
- Demonstrate capabilities in opportunity assessment for facilitating automation with strong business advisory capabilities to help enterprises in internal buy-in and guide them through a business process transformation journey

 Offer industry or function-specific (for example, finance, procurement and HR) automation/Al proprietary solutions

Note 1: Associated services include consulting, advisory, implementation and ongoing support for proprietary offerings.

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.



INTELLIGENT BUSINESS **AUTOMATION**

Observations

- Accenture is continuing to invest in its proprietary SynOps platform as well as making acquisitions such as that of Mudano, a UK-based Al and data science company specialised in financial services.
- **Atos** is investing heavily in adding new capabilities to its SyntBots automation platform, including citizen developer and explainable AI components. It has also partnered with ABBYY to integrate its intelligent document processing solutions into the SyntBots platform.
- **Capgemini** is consolidating its rich set of AI solutions into its Perform AI offering. It is also investing in expanding its talent base in both low-code and high-code AI skills.
- **Cognizant** is rapidly growing its intelligent business automation capabilities in the UK. It is focussed on training its workforce in AI automation skills through a large-scale citizen developer program.
- **Genpact** is distinguished by the deep industry and domain focus of its offerings for intelligent business automation, implemented for some of the world's largest enterprises.

- HCL is continuing to focus on its integrated automation delivery model and is also developing low-code/no-code options for citizen developers.
- Hexaware is gaining significant market share among large and midsized clients in the UK. It is adapting to the post-pandemic environment through automated process assessments for remote work environments and the introduction of a factory model for fast-tracking its solutions.
- IBM is reinforcing its market position around its "Extreme Automation" mission while also doubling down on process mining. This is primarily achieved through its acquisition of mylnvenio, a processing mining and digital twin specialist based in Italy.
- Infosys is continuing to invest in new proprietary intelligent automation capabilities through LEAP (Living Enterprise for Application Performance), which aims to personalise and simplify the use of Al-powered automation within enterprises.
- **TCS** has an extensive physical presence in the UK with multiple offices and delivery centres. It recently made big automation wins with clients such as Jaguar Land Rover.
- Wipro has launched more than 10 domain-specific use cases for intelligent automation. It has announced a partnership with Celonis to use digital twins for process monitoring and optimisation.
- **WNS**, a Rising Star in this quadrant, stands out for its extensive range of industry and point automation solutions. It has a strong focus on delivering change management services across the automation journey.

İSG Provider Lens



ACCENTURE



Accenture is a publicly listed global service provider offering consulting, technology and outsourcing services. Headquartered in Dublin, Ireland, the company serves about 91 of the Fortune Global 100 and more than three quarters of the Fortune Global 500. Globally, it has approximately 569,000 employees worldwide. It has invested heavily into developing SynOps, a proprietary business automation platform. With approximately 10,000 employees in six offices in the UK, including Edinburgh, London, Newcastle and Manchester, Accenture has a strong presence in the region. The firm generates nearly 10 percent of its overall intelligent business automation revenue from the region.



Orchestrated automation journey: Accenture's automation offerings are anchored in its proprietary SynOps platform that aims to orchestrate the client's journey to automation though human-machine collaboration and datadriven insights. The platform includes 3,000 automation solutions, more than 20,000 deployments, more than 160 analytics applications, and a range of tools and resources for process orchestration. The platform has an extensive range of functional and industry-specific offerings. Some of them include SynOps for Finance and SynOps for Supply Chain at the functional layer, and SynOps for Banking and SynOps for Health at the industry level.

Extensive partnership ecosystem: Accenture has an extensive partnership network in the intelligent automation space, comprising all hyperscalers and leading independent software providers (ISVs). Over the past year, it has significantly ramped up its use of process mining, particularly in collaboration with Celonis.

Highly acquisitive: Accenture has made a series of capability enhancing acquisitions in the intelligent automation space. A notable one is Mudano, a UK-based company that combines data science, AI and expertise in behavioural science to advise financial services companies on customer experience, regulatory compliance and financial crime risk reduction.

UK industry traction: Accenture has an established track record of automation delivery with some of the largest names in industry. One of them is GSK, where it used a data-driven digital marketing model to improve customer experience and responsiveness.



Accenture tends to focus on large enterprises with pricing at premium levels. It should consider making its intelligent automation services more accessible to the midmarket sector.

2021 ISG Provider Lens[™] Leader

With a wide range of automation solutions covering the complete automation journey for clients, Accenture remains a leader in intelligent business automation in the UK.



ATOS



Atos is a publicly listed company headquartered in Paris, providing digital solutions and consultancy services. It

emphasises digital security and decarbonisation of products and services for both itself and clients. The company has 105,000 employees in 71 countries worldwide. About 70 percent of its revenues come from Europe. In the intelligent business automation space, Atos earns approximately 20 percent of its revenue from the UK and Nordics. About one fifth of its automation workforce is located in these regions.



Comprehensive platform: Atos delivers automation services through its SyntBots intelligent automation platform, which covers the full lifecycle of automation spanning process discovery to RPA, service orchestration and managed services. Being platform agnostic, it can be hosted on any private, public or hybrid cloud and is also available in a self-contained on-premises version.

Robust discovery tools: Atos finds that a major hurdle to successful process automation is poor understanding of existing organisational processes among small and midsized companies. The SyntBots Process Discovery tool aims to overcome this hurdle, ingesting process data such as tickets and using NLP to sift and categorise it to identify those processes with the highest automation potential and assess the relative automation efforts required.

Functional and industry expertise: Atos brings deep industry and functional expertise to its intelligent business automation offerings, with a heavy focus on finance and accounting (for example, processing of accounts), supply chain, and customer service and contact centre solutions, among others.

Automation democratisation: Atos is embracing the low-code automation revolution through its proprietary Citizen Developer Studio and Virtual Assistant Workbench. This allows citizen developers to create their own pipelines of pre-trained AI models and attended-automation use cases, subject to safeguards such as autologging of new applications and an overall governance framework for appropriate use.



Atos plans to invest further in automation consulting and citizen Al development. It will be important to see how these initiatives develop over the next 12-18 months given the frenetic pace of innovation in this sector.

2021 ISG Provider Lens[™] Leader

With its end-to-end SyntBots automation platform, functional and industry expertise, and focus on lowcode automation, Atos is a leader in the UK market for intelligent business automation.



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 about 270,000 employees in nearly 50 countries. It primarily serves large enterprises (more than \$5 billion in annual revenues). Intelligent Automation is one of its largest practices and is at the core of the company's vision for "The Frictionless Enterprise." Capgemini has more than 25,000 data and automation AI experts worldwide and a large presence in Europe and the UK, backed by decades of experience in managing business operations for large enterprises. With nearshore and onshore capabilities, it has about 10 percent of clients supported by approximately 194 full-time employees (FTEs) in the UK.

Strengths

Consolidated, end-to-end automation solutions: Capgemini covers the complete value chain of automation within an enterprise, from process mining and opportunity assessment to roadmap creation, configurable, pre-built solutions and digital twins for virtualising specific operations functions. All of its Al assets have now been consolidated into Capgemini Perform Al, which also includes solutions designed for specific industries and sectors.

Process expertise: Capgemini's Digital Global Enterprise Model provides comprehensive peer-set comparisons for a range of different processes, allowing clients to assess how their processes compare against their industry peers. The model also helps to identify best-of-breed technologies, either proprietary or developed in partnership with the client, to drive organisational process improvements.

Applied Innovation Exchange: Capgemini provides a physical and virtual space for joint experimentation with clients on AI development. the Applied Innovation Exchange can be used for showcasing solutions, automation brainstorming with experts, and rapid development of automation prototype solutions.

Deepening AI talent base: Capgemini's talent base combines deep expertise across industry, processes and technologies. It is expanding its automation-focussed roles to include high-code machine learning for RPA engineers, low-code machine learning engineers, organisational change managers, advanced analytics engineers and digital adoption consultants.

Extensive industry traction: Capgemini has an extensive track record of delivering intelligent automation solutions for major UK-based clients. Some of them include central government departments and agencies, trading companies, an international airport, a leading insurer and a travel company.

isg Provider Lens

Intelligent Business Automation

CAPGEMINI



As Capgemini's business model is primarily focussed on large enterprises, it should consider making its automation offerings more accessible to the small and midsized enterprise market.

The company should offer more gainshare and outcome-based pricing models as part of its overall pricing mix.

2021 ISG Provider Lens[™] Leader

With a focus on automation potential across the complete value change and a rich set of Al-powered assets and capabilities, Capgemini is a leader in the intelligent business automation space in the UK.





COGNIZANT



Cognizant is a global professional services and technology company headquartered in the U.S. with a presence in more than 40 countries. It works with approximately 177 of the Fortune 500 companies and had approximately 296,500 employees as of March 2021. The company generates about 10 percent of its intelligent business automation revenues from the UK. It has more than 1,000 FTEs dedicated to intelligent business automation activities in the region. Over the past year, Cognizant has seen significant growth in its regional operations, with the number of clients reaching 197. The UK automation business is particularly focussed on the banking, insurance, retail, consumer packaged goods, technology, telecom and media industries.



Breadth of Al solutions: Cognizant offers the full sweep of proprietary Al platforms including RPA as a service, intelligent document processing, and an automation workbench for one-stop process-automation delivery. Its LEAF[™] Evolutionary AI platform, protected by more than 50 patents, uses evolutionary algorithms and deep learning to solve complex problems around product design and A/B testing.

Industry and functional solutions: Cognizant's main Al-based offerings are complemented with a rich palette of industry-specific automation solutions. Some of them include claims management in healthcare, smart audit in finance and accounting, and pharmacovigilance in healthcare. Functional solutions include automation services for claims adjudication, sales and marketing, and sales order processing.

Democratizing automation: The company is making a heavy push into the citizen developer/low-code space, running a major citizen enablement program for 60,000 of its employees working across more than 60 clients. The program uses coaching, agile methodologies and training frameworks to simplify automation tools and spread their application to wider business users within the enterprise.



While Cognizant's plans to expand its automation advisory offerings and strengthen its partnership network are very promising, it is too early to predict the impact of these investments in the U.K market.

2021 ISG Provider Lens[™] Leader

With its breadth of proprietary AI platforms, strong industry and functional solutions, and investments in citizen Al, Cognizant demonstrates its leadership in the intelligent business automation space in the UK.

imagine your future[®]



GENPACT



Headquartered in New York, Genpact is a global professional services firm focussed on delivering digital transformation services. It primarily serves global Fortune 500 companies and operates in more than 30 countries across the world. Its FY20 revenues were \$3.7 billion, up 5 percent year on year. The company serves clients through a global network of 70 delivery centres, of which five are in the UK. It employs more than 300 people in the region through delivery centres in London, Nantgarw, Watford City and Manchester. The UK contributes nearly 15 percent of Genpact's intelligent business automation revenue.



Comprehensive platform: Genpact's intelligent automation solutions are built around its Cora AI platform, encompassing a host of automation modules ranging from computer vision, machine learning, process mining, NLP and RPA to data engineering and data science. The platforms come with orchestration capabilities and a range of accelerators to speed the automation journey for clients.

Deep domain expertise: Genpact's automation solutions are built on a foundation of deep functional, domain and industry expertise, with the ability to add different components as business needs change . Specific domain applications include Cora APFlow (for accounts payable and supplier management), Cora LiveSpread (for commercial underwriting and risk management), and Cora PharmacoVigilance (for meeting compliance and safety standards in the management of clinical and pharmacology data).

Industry traction: Genpact works on Al-powered transformation with many of the largest companies in the world, including food giant Mondelez International, global hospitality and entertainment company MGM Resorts International. It also addresses the automated order fulfilment requirements of a global manufacturer of aircraft engines.



Given its sizable client and employee presence in the UK, Genpact should ramp up its marketing and brand activities to better showcase its capabilities in the UK.



With its comprehensive Cora digital business platform and deep industry and domain expertise, Genpact remains a leader in the UK for intelligent business automation services.



HCL

Overview

HCL Technologies (HCL) is a large multinational IT service provider headquartered in Noida, India. It primarily targets large enterprises and the midmarket, which account for most of its revenues. HCL is one of the leading providers of cognitive automation solutions and services in the UK, earning a significant proportion of its intelligent business automation revenues from the market and experiencing rapid growth over the past year. It delivers automation services through its digitalCOLLEAGUE hyper-automation suite of services, supported by DRYICE™, its organic software division focussed on AI solutions. It also has a large, dedicated workforce in the UK with a delivery centre in Belfast, Northern Ireland.



Comprehensive platform: HCL digitalCOLLEAGUE covers the full sweep of Al-powered automation services and solutions. It offers process reimagination (Lean/Six Sigma, process discovery and task mining), intelligent automation (workflow automation, RPA, etc.), analytics, business intelligence and reporting, and experience management (self-service enablement, omnichannel experience, etc.). These are underpinned by a library of more than 1,000 pre-built use cases. Clients can also draw on HCL's Advantage DPA, a set of frameworks and tools to ensure a speedy and consistent automation journey.

Conversational AI: HCL offers an out-of-the box digital workplace assistant that can engage in natural conversations with employees, pre-emptively resolve issues, monitor outcomes and provide recommendations for management action. The solution comes with a catalogue of pre-built use cases and includes a low-code cognitive console for building, training, deploying and managing more complex conversations. It also offers voice genomics, for example, speaker voice recognition, accent management, noise removal, tonal analysis and emotions from voice.

Process discovery and mining: HCL DRYiCe[™] iControl provides an end-to-end view of processes across infrastructure, applications and core business processes. It is available in eight domain packs, covering industries from financial services and retail to oil and gas. These process discovery capabilities are augmented by HCL's deep strengths in data science services, designed to further optimise business processes and deliver tangible business outcomes.

Compelling client credentials: HCL has deep experience in implementing intelligent automation projects for many of the world's largest enterprises. For a leading bank in the U.K, it automated retail banking processes such as customer on-boarding and loan processing that previously had a long turnaround time and led to high levels of customer dissatisfaction. By applying more than 11 digitalCOLLEAGUEs across business intelligence, customer care and revenue management, HCL was able to reduce the average turnaround time from 2 days to 6 hours, increase process accuracy from 89 percent to 99.3 percent, and process 99 percent of transactions within the service-level agreement as against the previous rate of 78 percent.



HCL



Given the trend toward increasing industry specialisation within intelligent business automation, HCL should consider developing more industry-specific offerings and services.

2021 ISG Provider Lens[™] Leader

With its comprehensive suite of end-to-end intelligent automation services, allied to its expertise in conversational AI and process discovery, HCL continues to be a leader for intelligent business automation services in the UK.



HEXAWARE



Founded in 1990, Hexaware is a global IT consulting and digital solutions 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 EMEA, and has its UK headquarters in London. The company generates about 10 percent of its overall automation solutions revenue from the UK, where it serves more than 25 large and midsized clients. Hexaware has a dedicated resource pool for intelligent business automation in the region.



Unified approach: With its ethos of "Automate Everything," Hexaware offers a complete lifecycle approach to intelligent automation, with capabilities such as process discovery and mining, RPA, NLP, Al and machine learning for speech and image processing. These are delivered primarily through its proprietary Tensai[™] (Japanese for "genius") platform that offers intelligent automation for infrastructure, operations and testing.

Point solutions: Hexaware stands out for its range of industry-specific point solutions: The Teams COCO bot automates all the touchpoints of an employee's digital journey; AutomateON is a home-grown platform for automating processes through intelligent bots; and Intelligent Document Classification is a banking-industry solutions using optical character recognition (OCR) and NLP for document classification and date extraction.

Pricing flexibility: Hexaware offers a range of intelligent automation pricing models that are carefully calibrated to the needs and business goals of different clients. These include transaction-based pricing for managed services and outcome-based pricing involving risk sharing or gainsharing components. This pricing flexibility is likely to appeal to midsized enterprises seeking transactional certainty and to larger enterprises aiming for transformation business deals with significant elements of co-investment.

UK industry traction: Hexaware's automation solutions have proved popular with both large and midsized enterprises in the UK, such as a leading financial services company headquartered in Cardiff.



Given the frenetic pace of change in intelligent business automation, Hexaware may need to invest more to scale up its machine learning capabilities to maintain its velocity within the leadership space in the UK.

2021 ISG Provider Lens[™] Leader

With its "Automate EverythingTM" philosophy, raft of proprietary solutions and flexible pricing models, Hexaware appeals to both large and midsized enterprises in the UK for their intelligent automation needs.



IBM



IBM is a publicly listed large global IT service provider headquartered in New York. It serves more than 4,000 automation clients, with a particular focus on banking and financial services, followed by the public sector, life sciences, energy and utilities, and manufacturing. It has approximately 40,000 FTEs globally engaged in intelligent automation activities. The company generates about 10 percent of its automation revenue from the UK. It serves clients through 20 major automation delivery centres located in seven countries.



IBM's focus on the complete automation journey may appeal more to large enterprises with complex processes. It should thus consider options and pricing models for the midmarket.

The company's foray into process mining is relatively new, indicating a need for greater marketing and thought leadership to bring these capabilities to the attention of the market.



Extreme Automation: Guided by a vision of "Extreme Automation," IBM aims to cover the complete customer automation journey encompassing advisory services, automation build and automation management. It offers two platform options: a pre-built IBM Cloud Pak® for Automation platform that helps clients design, build and run their own automation processes, and the IBM Services Essentials for Automation platform, typically forming part of a managed services agreement. The latter includes an automation learning centre, an automation control tower, 20,000 digital workers for complex processes, process assessment tools and other automation assets.

Deep UK roots: IBM has an extensive employee and client footprint across the UK, with offices in 18 locations. The UK is also home to IBM's Research Europe hub, with a team of 60 researchers, computational scientists and engineers focussed on cutting-edge research in technology systems, high-performance computing and encryption. The company is collaborating with the UK government on the New Hartree National Centre for Digital Innovation that aims to support businesses in adopting new digital technologies such as AI and quantum computing.

Enhanced focus on process mining: IBM is doubling down its process mining capabilities, most notably through its partnership with Celonis and the acquisition of mylnvenio, a process-mining and digital-twin provider. These capabilities enable IBM to help clients avoid piecemeal approaches to automation and instead look at the bigger picture of how to improve organisational processes and operating models.

2021 ISG Provider Lens[™] Leader

With its extensive footprint across the UK, alongside deep expertise in AI technologies and processes, IBM continues to be a leader in the region for intelligent business automation.



INFOSYS



Infosys is a publicly listed global company, offering consulting, technology, outsourcing and next-generation digital solutions and services. It has 1,659 clients in more than 50 countries and more than 260,000 employees worldwide. About three quarters of its global revenue comes from large enterprises (more than \$5 billion in annual revenues). In 2014, it acquired EdgeVerve, a company focussed on AI and intelligent automation. Infosys serves UK-based clients through a network of offices in Edinburgh, London, Nottingham and Swindon. It generates approximately 15 percent of its intelligent business automation revenue from the region.



Intelligent automation at the core: For Infosys, AI and intelligent automation are embedded across all services — cloud and infrastructure management, application maintenance, application development migration and modernization, and business process management. Its offerings include process mining, intelligent business process outsourcing, intelligent document processing and conversational AI. These offerings are complemented with more than 12,000 bots and over 5,000 AI use cases.

Focus on living enterprise: Infosys LEAP (Living Enterprise Application Platform) is a flagship AI platform that aims to personalise the user experience of intelligent systems, increase reliability, and tackle frictions that erode performance within an enterprise. The platform offers a vast range of automation assets services, including an AI virtual agent, virtual labs for experimentation, observability services, bots, knowledge graphs and learning and gamification tools.

Balanced offering: Infosys offers a balanced portfolio of in-house platforms and offerings via third-party partnerships, including most of the leading intelligent automation and process mining software providers such as Automation Anywhere, Appian, UiPath, Celonis and Blue Prism.

Deep UK presence: Infosys has carried out a range of intelligent automation projects in the UK, including a conversational AI solution using the Nia[™] chatbot for a UK-based airport, and automated live agent support for a leading consumer packaged goods company.



Infosys primarily serves large enterprises. It should also consider offerings that are more tailored to the small and midsized enterprise market.

Given Infosys's significant footprint in the UK, it could play a greater role in thought leadership around intelligent automation, explaining its wider role and impact to businesses and decision makers.



With a solid core of intelligent automation running across all its offerings, a network of UK offices, and a track record of delivery for large enterprises, Infosys stands out as a leader in the UK market for intelligent business automation.



TCS



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 183 locations worldwide. It has been one of the leading providers of intelligent business automation solutions and services in the UK over the last few years and continues to win major deals. It serves approximately 50 intelligent automation clients through 18 delivery centres across the UK and Ireland.



Strengths

Comprehensive tooling and solutions: TCS offers the full gamut of intelligent automation solutions, including process mining and opportunity assessment, intelligent document processing, conversational AI (especially contact centres), and digital twins to virtualise processes for rapid business experimentation in a low-risk environment. It has recently added new types of data such as management input, benchmarking data, and process mining data, to its Machine First Delivery Models.

Maturity assessment: TCS understands that clients can vary significantly in their automation maturity. TCS Cognix[™] Operation Maturity Assessment helps clients to carry out a rapid assessment (in about 15 minutes) of their current function's health. There are 35 assessment models and more than 500 key performance indicators across industry functions, enterprise functions and IT infrastructure operations. The rapid assessment is followed by a very comprehensive assessment (over 2-3 weeks) to lay out a more contextualized digital transformation roadmap. TCS Cognix™ Metrics Central enables clients to benchmark their processes against anonymised data from peers and also recommends ready-to-use assets to help improve the performance of the underperforming metrics.

Versatility in consumption: TCS Cognix[™] can be consumed in several ways, including bundled automation technology and services (the client pays only for the services), a-la-carte pricing or pricing based on technology components alone.



ÎSG Provider Lens

Intelligent Business Automation

TCS



Given its strong presence in the UK, TCS should showcase more client success stories through marketing materials and thought capital.

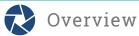
The company appears to be relatively quiet on the acquisition front, making it hard to discern its strategy for acquiring new capabilities and market segments.

2021 ISG Provider Lens[™] Leader

With a comprehensive set of intelligent automation solutions and an extensive presence across the UK, TCS remains a leader in the intelligent business automation space in the region.



WIPRO



Wipro is a publicly listed global technology services company with 209,890 employees. Based in India, it generated revenues of \$8.1 billion for FY21. Approximately 30 percent of its overall revenues come Europe. It has employees in 66 countries and serves enterprise clients across 27 industry segments. The company 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 first came to the region in 1995. Wipro has approximately 4,400 employees across the UK and Ireland. To better serve its clients, the company has recently established a new innovation centre in London that is primarily focussed on implementing intelligent automation proofs of concept (PoCs) and helping clients with their digital transformation initiatives.



Partnership with Celonis: Responding to the growing demand for faster and more effective process discovery, Wipro has partnered with Celonis to launch the Global Celonis Center. The facility enables clients to use digital twins for monitoring and standardization processes, as well as identifying opportunities for automation and enhanced business efficiency.

Domain-specific solutions: Wipro has responded to the growing demand for domain solutions by launching more than end-to-end domain solutions. Notable examples include TaloSafe, an Al-powered automation solution for the life sciences industry, designed to analyse and automate large volumes of unstructured clinical pharmacovigilance data. The solution has yielded a 30 to 50 percent reduction in case processing times and saved 30 to 40 percent in operating expenditure on pharmacovigilance. Other domain-specific solutions include end-to-end automation for complaints operations, procure-to-pay, intelligent insurance underwriting, factory operations and warranty lifecycle management.

Pricing model flexibility: Wipro offers a wide variety of pricing models, including a range of outcome-based approached such as risk reward, milestone-based, gainshare and KPI-driven payments. It also offers pay-as-yougo and deferred payment models, which may be particularly appealing to smaller enterprises and businesses that have been adversely affected by the pandemic.



Given its significant presence in the UK, Wipro should consider ramping up its marketing and thought leadership efforts to showcase its abilities more prominently.

2021 ISG Provider Lens[™] Leader

With its wide range of domain-specific solutions, deep industry expertise and pricing model flexibility, Wipro is a clear leader in the UK market for intelligent business automation.



ISG Provider Lens

RISING STAR: WNS



Established in 1996, WNS is a publicly listed global provider of business process management and digital-led transformation solutions. It provides industry, technology, analytics and process expertise to more than 375 clients across the world. It has more than 49,000 employees worldwide and a network of delivery centres globally, including the UK. It provides intelligent automation services through its WNS Intelligent Automation TRAC, which encompasses domain-specific solutions, RPA, process automation, IDP and AI- and ML-based offerings.



Despite its significant presence in the UK, WNS may be a less familiar brand in the space of intelligent automation compared to other IT service providers or global system integrators. It should consider improving its brand presence through more concerted marketing and thought leadership investments.



Comprehensive portfolio: WNS provides a broad spectrum of services to its customers across the automation cycle, including hyper-automation, intelligent automation, low-code, IoT, advanced OCR, machine learning and blockchain. WNS has an extensive partnership ecosystem focused on geographies and industry verticals with partners including Automation Anywhere, UiPath, Blue Prism, Microsoft, EvoluteIQ, Kofax, Celonis, Uniphore and many more.

Industry and point solutions: WNS has several domain-led automation suites, a hyper-automation platform and industry solutions to accelerate IBA adoption. These include: WNS Malkom, an IDP solution for automating documentation in the shipping and logistics industry; WNS VerifareSM, an AI-powered solution used by airlines for fares auditing to identify discrepancies in receipts; WNS TrackboxSM, a multi-channel document that provides automation solutions to healthcare providers; and WNS CollecTRACSM, an accounts receivable solution that is ready to integrate with client-specific portals and enterprise applications.

Flexible commercial models: WNS provides flexible commercial models to suit its clients' requirements. These include fixed price, gainshare, core-flexi capacity based (FTE- or complexity-based), milestone-based and hybrid models. More than 40 percent of its total contracts have complexity-based pricing in place.

2021 ISG Provider Lens™ Rising Star

With a strong set of industry and point automation solutions as well as extensive experience in supporting major enterprises across their automation journey, WNS has emerged as a Rising Star in the intelligent business automation space in the UK.





ISG Provider Lens™ Quadrant Report | December 2021

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)

- 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

ÎSG Provider Lens



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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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