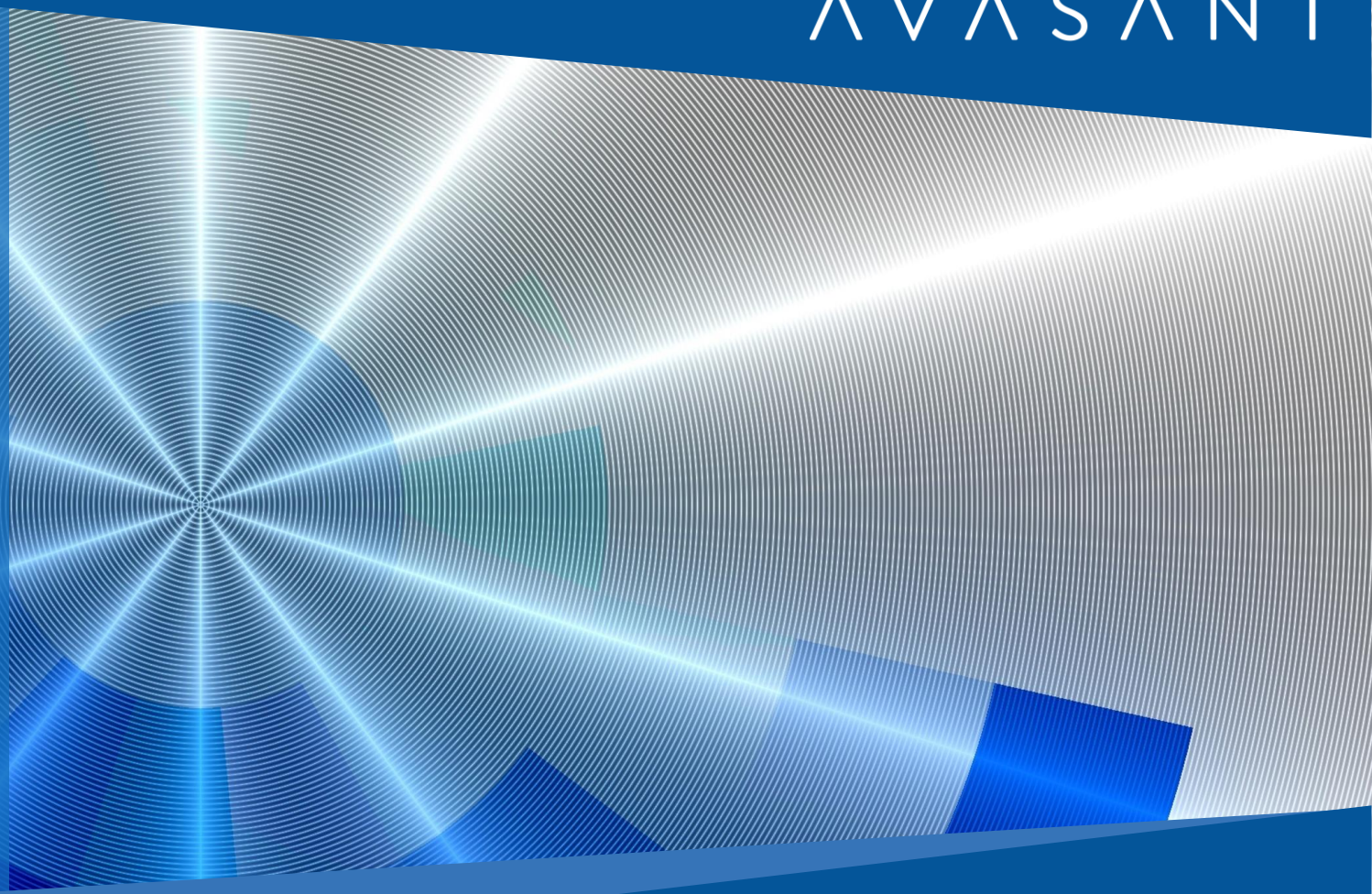
Intelligent Automation Services 2023–2024 RadarView™ – Report Excerpt

Redefining automation workflows with generative AI

February 2024



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About the Intelligent Automation Services 2023–2024 RadarView

1. Generative AI's emergence has heightened enterprise demand for AI integration across the automation value chain, prompting service providers to reshape workflows. This includes advancements such as multimodal document processing, human-like interactions, and improved accuracy in recommendations.

2. Avasant evaluated 35 providers using a rigorous methodology across the key dimensions of practice maturity, partner ecosystem, and investments and innovation. Through its analysis, Avasant recognized 25 providers that brought the most value to the market over the past 12 months.

3. The *Intelligent Automation Services 2023–2024 RadarView* aims to provide a view into the leading service providers offering intelligent automation services. Based on our methodology, these service providers are categorized into four broad segments: leaders, innovators, disruptors, and challengers.

4. Each service provider profile gives an overview of its intelligent automation services capabilities. This includes the provider's enterprise clients and case studies, key IP assets/solutions and partnerships, major industry verticals served, and analyst insights on the three key dimensions defined in the second point above.

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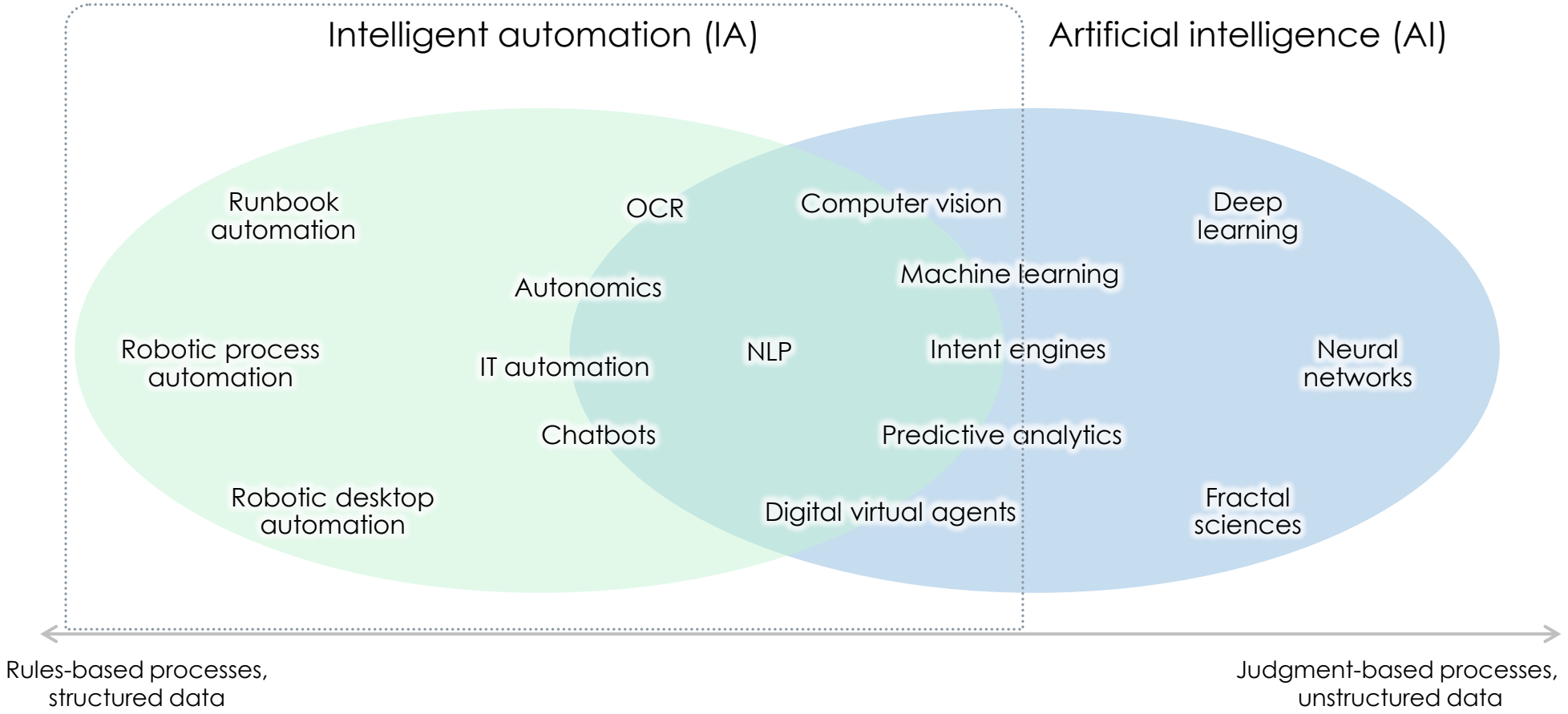
Executive summary

Defining intelligent automation

Intelligent automation (IA) is a combination of robotic automation and one or more AI technologies



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Key enterprise intelligent automation services trends shaping the market

Enterprises increase spending to integrate advanced cognitive automation features

- More than 85% of enterprises plan to increase digital spending in intelligent automation over the next 12–18 months. This surge is geared towards expanding IA initiatives, often integrating advanced cognitive automation features like AI, ML, NLP, and Gen AI.
- Manufacturing, retail and CPG, and healthcare and life sciences lead in IA adoption, leveraging it to extract insights from vast unstructured data, optimize operations, and deliver personalized customer experiences.

IA now integrated into digital transformation contracts, reducing standalone projects

- Since 2021, there has been a declining trend in standalone automation projects, dropping from 55% in 2021 to 44% in 2022 and further to 29% in 2023. This reflects an enterprise-wide shift from task-based automation towards process transformation.
- Enterprises are increasingly integrating a combination of digital technologies, including analytics and NLP, with automation to facilitate broad-ranging digital transformation initiatives across the entire organization.

Low-code automation projects on the rise as enterprises empower employees to build automation workflows

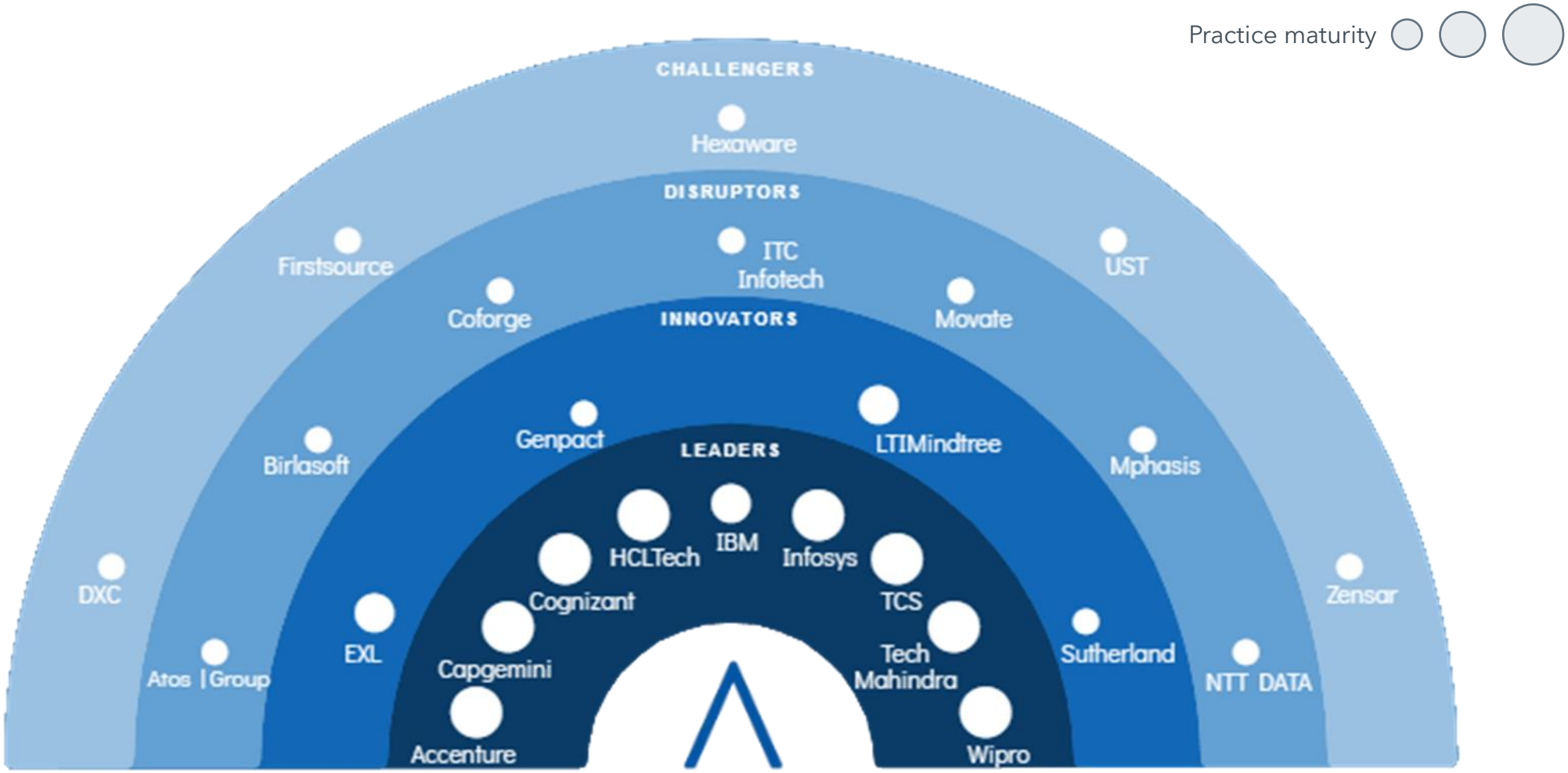
- In 2023, low-code automation projects experienced a year-on-year increase of 43%, driven largely by growing enterprise interest in empowering employees to create their own automation workflows. To scale automation efforts, many enterprises are implementing citizen developer programs.
- These initiatives are supported by a centralized governance framework jointly developed by the IT and business teams of the organization to deploy automation responsibly and efficiently.

Gen AI is transforming the entire spectrum of intelligent automation value chain

- Gen AI is reshaping workflows throughout the automation value chain, improving operational efficiency and accuracy.
- It has revolutionized various aspects of automation, including document processing (multimodal data processing and summarization), conversational AI (enabling knowledge base search and intuitive interactions), and AIOps (enhancing infrastructure observability and ticket resolution).

Source: Avasant Research

Avasant recognizes 25 top-tier providers supporting the enterprise adoption of intelligent automation



Note: Please refer to Avasant's *Intelligent Automation Services 2023–2024 RadarView* for detailed insights on the service providers and supply-side trends.

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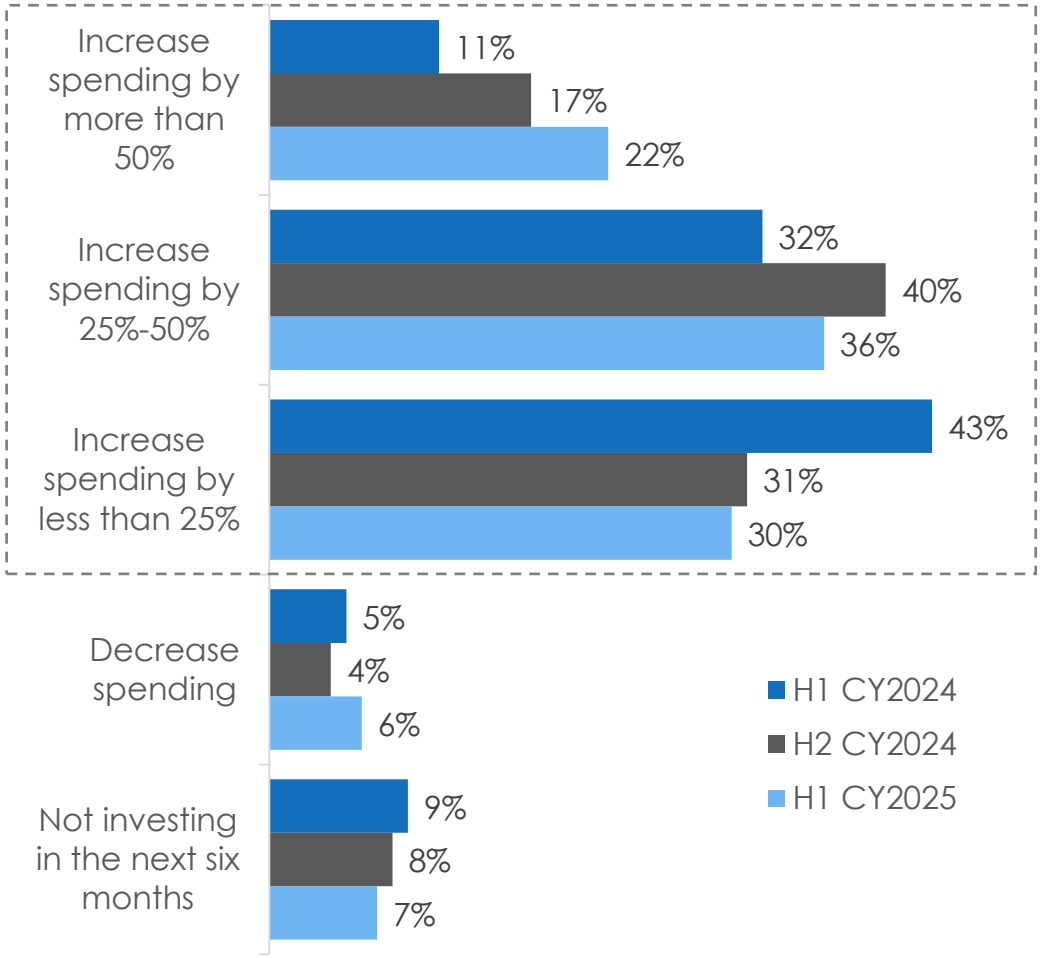
State of the market

Over 85% of enterprises are showing significant interest in investing in intelligent automation over the next 12–18 months

Estimated digital spending change in intelligent automation



These investments are aimed at scaling IA initiatives

Enterprise	Implementation description
dexcom	• Executed a three-phase automation journey: phase one concentrated on establishing automation capabilities across departments like HR, IT, F&A, and so on. Phase two entailed transitioning automation development and support to in-house teams. • In phase three, they plan to explore chatbots with natural language processing (NLP) and introduce process mining.
Raben	• Automation implementation at Raben has completed work equivalent to that carried out by 302 full-time employees per month. Additionally, it has saved over EUR 6M annually. • Moving forward, the company is exploring the integration of hyperautomation driven by AI and ML into new business processes.
vodafone	• Vodafone Turkey has digitalized 1,005,000 business hours using UiPath's automation platform, saving USD 268,000 and generating revenue of USD 1.4M. • By 2024, the company aims to increase its digitalized business time by 50% to 1,500,000 hours and enhance the utilization of existing cognitive automation via OCR and AI.

Note: The numbers may not add up to 100% due to rounding off

Sources: Avasant-NASSCOM Digital Enterprise 2024 Report; Avasant IA Services RadarView Survey, September 2023–November 2023

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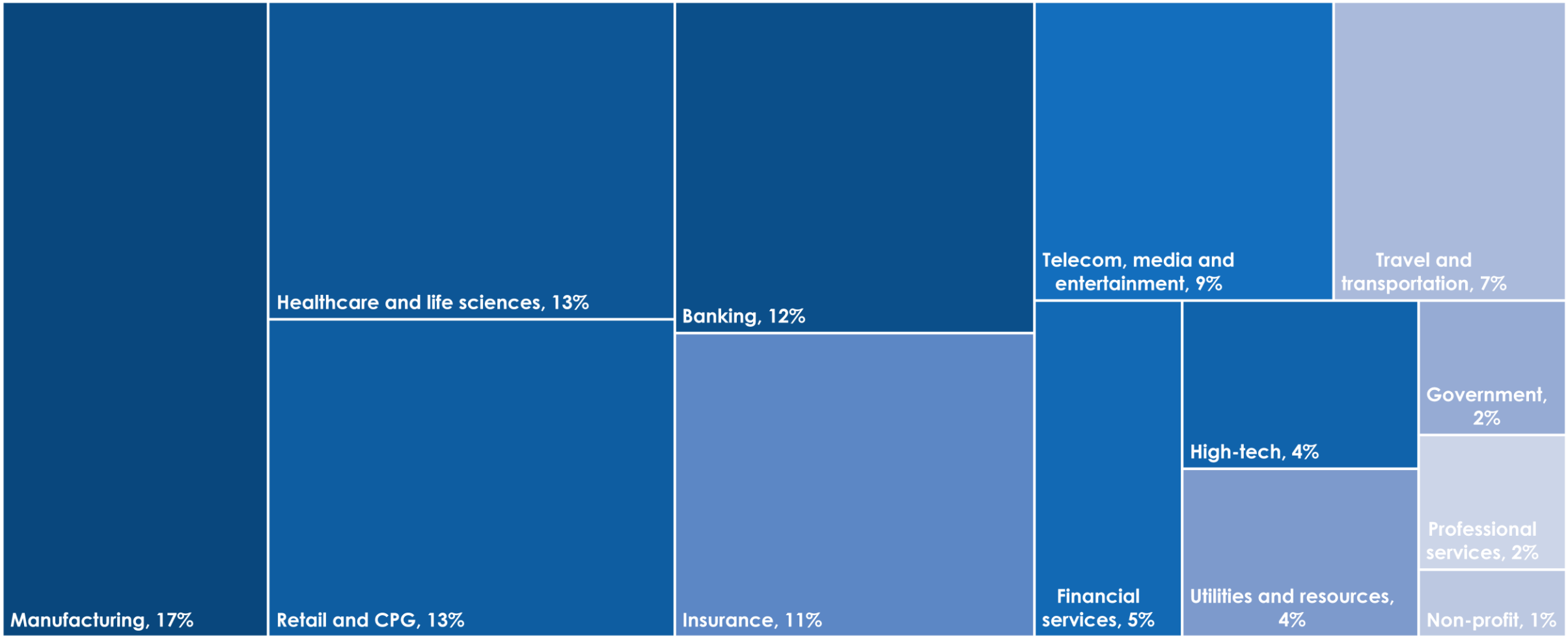
Manufacturing, retail and CPG, and healthcare and life sciences are at the forefront of IA services adoption

These industries lead in implementing IA services to extract insights from huge amounts of unstructured data, enhance operational efficiency, and provide personalized customer experiences.



Note: Out of 4,904 total clients, the percentages in this figure represent the distribution of intelligent automation clients across industries.
Sources: Avasant Research; Avasant IA Services RadarView Survey, September 2023-November 2023

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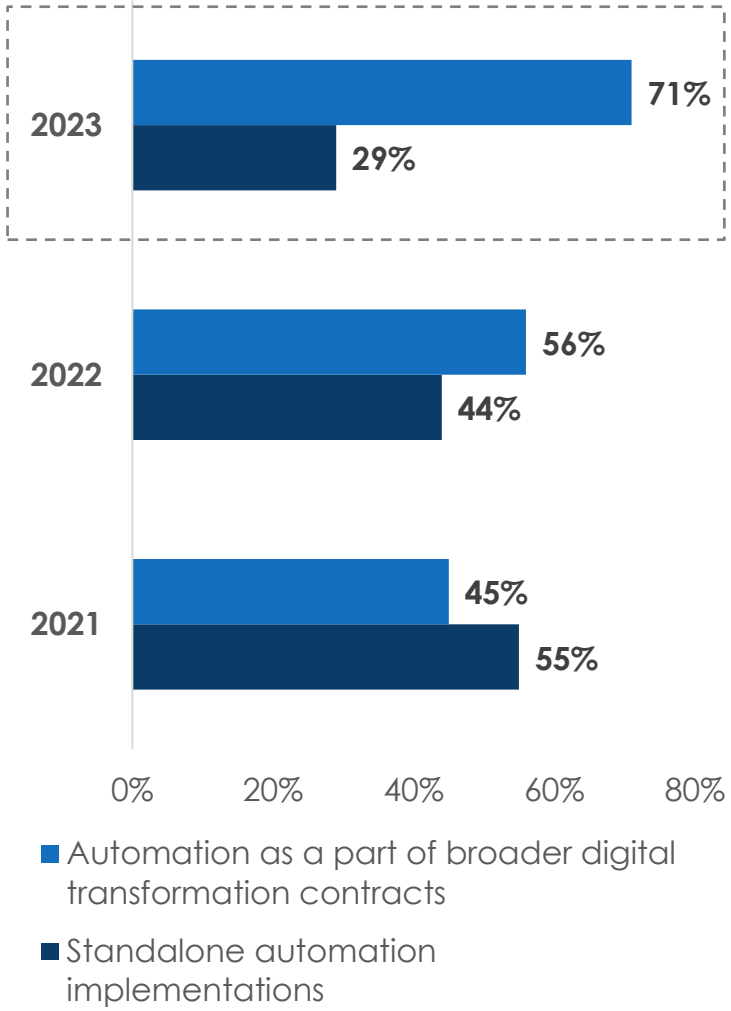
Intelligent automation has become an integral part of digital transformation contracts, leading to a decline in standalone projects

Intelligent automation engagements split



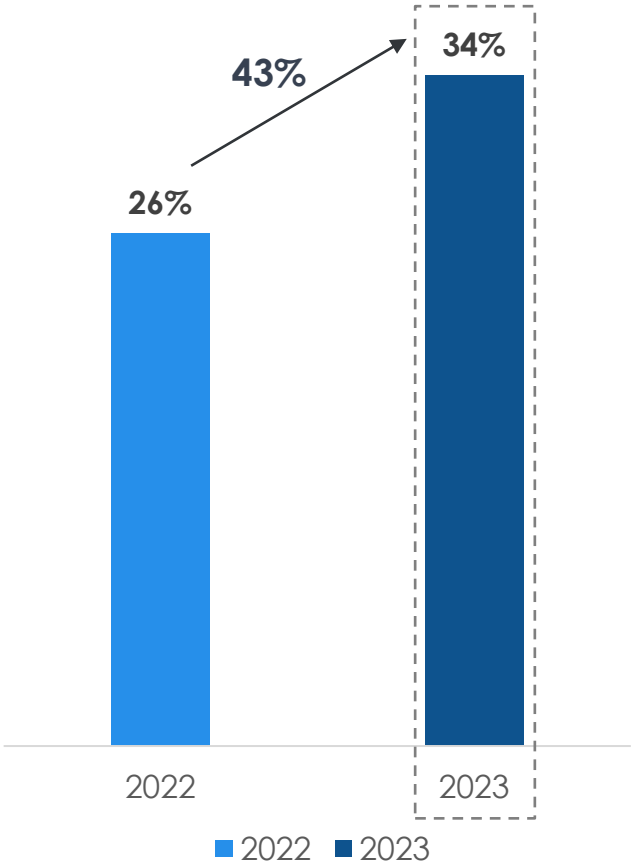
Illustrative examples of enterprises leveraging automation as a part of broader digital transformation initiatives

Enterprise	Tech convergence	Implementation description
FAB First Abu Dhabi Bank	• AI/ML • RPA • NLP • Data analytics	• Established an intelligent automation CoE within the data analytics and AI department to drive intelligent automation initiatives across the bank. • This unit integrates RPA with cutting-edge technologies such as AI, ML, natural language processing (NLP), and cognitive capabilities to streamline operations, enhance efficiency, and drive digital transformation.
PEPSICO	• RPA • Predictive analytics • Robotics • Process mining • AI	• Implemented a digital transformation strategy to optimize backend operations encompassing accounts receivable and payable, procure-to-pay, order-to-cash, and warehouse management, leveraging intelligent automation, robotics, predictive analytics, process mining, and AI. • It reduced the number of rejected sales orders by 86%, saved 1,000 hours per year in accounts payable processing, and minimized write-offs.

Sources: Avasant Research; Avasant IA Services RadarView Survey, September 2023–November 2023

Enterprises are increasingly establishing citizen developer programs to expand automation efforts across the organization

Low-code automation implementations as a percentage of total automation implementations



Illustrative examples of enterprises building citizen developer programs to scale automation efforts

Enterprise	Details of implementation
GENERALI	• In 2020, Generali Investments launched a citizen developer program to train its employees in smart automation concepts such as RPA, AI, no-code/low-code platforms, and ML. • More than 50 citizen developers contributed to developing over 30% of the company's automated processes, significantly enhancing its ability to handle automation requests.
Jatco	• JATCO's R&D department has achieved significant effort savings of over 200,000 hours through automation over the past four years. As the company expands its automation initiatives across the enterprise, it empowers citizen developers in each division to create their automation workflows. • With over 900 individuals capable of developing RPA, JATCO is poised to further enhance efficiency and productivity throughout its operations.
wesco	• Wesco has implemented a citizen developer governance framework along with training programs, allowing its 20,000 employees worldwide to effortlessly submit their automation ideas to Wesco's intelligent automation CoE. • Since the program's launch, over 200 citizen developers from various business units have participated, contributing to 60% of the executable automation ideas.

Sources: Avasant Research; Avasant IA Services RadarView Survey, September 2023–November 2023

The entire automation value chain is experiencing significant enhancements through Gen AI

Automation value chain	Capability	Description
Intelligent document processing	Document summarization	Deutsche Bank used Google Cloud's Gen AI-powered Document AI Workbench for extracting content from complex documents across multiple domains. It also enabled cognitive searching and document summarization.
	Multimodal document processing	JPMorgan launched DocLLM, a generative language model for multimodal document processing. It leverages a combination of sentimental and spatial analysis to process multiformat documents.
Conversational AI	Knowledge base search	The OCBC Bank launched a Gen AI-powered chatbot solution to assist its 30,000 employees. This solution will support employees with investment research and report creation, product ideation, and marketing material development.
	Intuitive interactions	VIA Metropolitan Transit implemented IBM's Gen AI chatbot, IBM Watsonx assistant, to provide passengers with transit information in Spanish and English languages. Since its launch, it has assisted 28,000 unique users and processed over 41,000 customer conversations.
AIOps	Ticket resolution	Twilio deployed a Gen AI-powered copilot solution to automate its IT service desk process. It increased employee satisfaction scores by 83% and saved over USD 1M annually in operational costs.
	IT infrastructure observability	InterContinental Hotels Group deployed a Gen AI solution to monitor and optimize IT infrastructure space availability. This solution increased IT visibility while improving incident root cause analysis and event correlation.
RPA	Attended automation	A toy and entertainment conglomerate implemented Automation Anywhere's AI-driven assistant and Automation Co-Pilot, a Gen AI-backed automation platform, to automate HR reporting, finance budgeting, procure-to-pay, and order-to-cash.
	Unattended automation	A global healthcare company is partnering with Automation Anywhere to establish Gen AI guardrails while exploring automation use cases in code development, customer service experience, and regulatory compliance.
Process discovery/ mining	Self-service	PepsiCo leverages Celonis Process Copilot, a Gen AI-powered process mining solution, to expand self-service capabilities seamlessly, avoiding bottlenecks or delays.
	Process mapping	Carrefour utilizes Celonis Copilot to streamline process mapping for procure-to-pay and accounts payable operations. It aids in identifying bottlenecks and effortlessly generating graphs to enhance operational efficiency.

Source: Avasant Research

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Capgemini profile

Capgemini: RadarView profile

Capgemini

AVASANT RADARVIEW™ LEADER Intelligent Automation Services 2023-2024

Practice maturity ★★★★★

Partner ecosystem ★★★★★

Investments and innovation ★★★★

Specializes in CX-based automation. Has been strengthening its generative AI offerings by partnering with Microsoft, Google, AWS, and Mistral AI.

Practice overview

- Active since: 2014
- Practice size: 31,000+
- Active clients: 900+
- External certifications: 21,500+
- Delivery highlights: 85 global delivery centers

~30%	300+
CX use cases automated	Reusable bots in FastTrack Hub

Client case studies

- Established an automation CoE and deployed RPA, conversational AI, and low code automation platform at a Sweden-based food packaging company to enhance its digital transformation. It automated about 120 processes and delivered 400 automation artifacts.
- Implemented an automation solution at an engineering and consulting company to improve the performance and availability of business-critical processes. It led to a 95% reduction in turnaround time and annual savings of 5,400 hours in effort.
- Established an automation and innovation club leveraging automation CoEs and implemented self-healing bots for a global beverage bottler to optimize incident management. It reduced high-priority incidents by 50% and saved nearly $0.7M in costs.
- Deployed RPA and ADMnext for the American Dental Association to reduce IT operational costs and modernize legacy processes. It automated membership and payment processes and optimized IT spending across the organization.

Key IP and assets

- Capgemini Enterprise Automation Fabric: A unified intelligent automation-as-a-service platform that offers real-time bot deployment, customization, monitoring, integration, and analytics
- IPA maturity framework: An automation identification and maturity assessment framework
- ESOAR: A methodology to develop and implement intelligent automation solutions
- Capgemini Digital Global Enterprise Model: An AI-powered business process automation platform

Key partnerships

Technology providers

PEGA, ORACLE, aws, SAP, servicenow, IBM, sas, Microsoft, Google, dataiku, celonis, WorkFusion, HORTONWORKS

Tool providers

AUTOMATION ANYWHERE, SS&C blueprism, salesforce, UiPath™, ABBYY

Sample clients

- A Sweden-based food packaging company
- An engineering and consultancy company
- A global beverage bottler
- American Dental Association
- A Britain-based fashion house
- A multi-insurance firm
- A Switzerland-based pharmaceutical firm
- An entertainment and media company
- A Canada-based bank
- A US-based medical technology company

Industry coverage

- Banking
- Financial services
- Government
- Healthcare & life sciences
- High-tech
- Insurance
- Manufacturing
- Nonprofits
- Professional services
- Retail & CPG
- Telecom, media & entertainment
- Travel & transportation
- Utilities & resources

Darker color indicates higher industry coverage

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Capgemini: RadarView profile

Analyst insights

Practice maturity ★★★★★

- Capgemini's intelligent automation services portfolio covers consulting, process mining, CoE setup, bot deployment and management, and low code automation implementation. It offers end-to-end process automation using proprietary platforms, automation accelerators, AI-powered virtual assistants, and bot libraries.
- It offers plug-and-play platforms through which customers can implement out-of-the-box automation solutions on a pay-as-you-go model to lower their overall CAPEX. Examples include Enterprise Automation Fabric and 890 by Capgemini, which has around 170 solutions across NLP, IDP, and analytics.
- It has built a repository of frameworks and methodologies, such as IPA-TOM, ESOAR, Four Step Methodology, STARDUST, and Five Pillars of Process Discovery and Excellence, to assess automation maturity and design automation roadmaps.
- It specializes in CX services and plans to enhance them by building generative AI solutions, such as personalized chatbots and assistants for content, knowledge, and design operations.

Partner ecosystem ★★★★★

- Capgemini has partnerships with technology providers such as SAP, Oracle, Microsoft, Google, ServiceNow, IBM, AWS, and Cloudera and with automation tool providers such as UiPath, Automation Anywhere, Kryon, Abbyy, and BluePrism to deliver automation solutions to clients.
- In the past 12 months, it has expanded partnerships with several technology providers such as Salesforce, Microsoft, and Google to create generative AI solutions and established generative AI CoE to enhance automation, digital transformation, and business intelligence capabilities.
- It has over 2,500 Pega-certified professionals and leverages its partnership with Pega Systems to develop automation solutions for industries such as BFSI, manufacturing, and retail. In addition, it has established six CoEs in partnership with Pega.

Investments and innovation ★★★★

- Capgemini has set up several internal AI and automation academies to upskill employees across automation tools from Automation Anywhere, UiPath, and BluePrism and in scripting languages such as R, Python, and PowerShell.
- It has established over 50 innovation labs for intelligent automation and has dedicated CoEs for conversational AI and RPA. It also has AI CoEs for industries such as the public sector, BSFI, and manufacturing.
- It is developing proprietary tools and platforms, including an industry- and process-specific NLP toolkit called ATLAS. It is also building a reusable connector library to help clients increase the adoption of low-code automation.

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Appendix:
About RadarView

Avasant's Intelligent Automation Services 2023–2024 RadarView assesses service providers across three critical dimensions

Practice maturity	• This dimension considers the current state of the provider's intelligent automation practice in terms of its strategic importance for the provider, the maturity of its offerings and capabilities, and client engagement. • The width and depth of the client base, use of proprietary/outsourced tools and platforms, and quality of talent and execution capability are all important factors that contribute to this dimension.
Domain ecosystem	• This dimension assesses the nature of the ecosystem partnerships that the provider has entered into, the objectives of the partnerships (codevelopment and co-innovation), and its engagement with solutions providers, startup communities, and industry associations. • The kind of joint development programs around offerings, go-to-market approaches, and the overall depth of partnerships are all important aspects of this dimension.
Investments and innovation	• This dimension measures the strategic direction of the provider's investments and the resultant innovations in the offerings and commercial model and how it aligns with the future direction of the industry. • The overall strategic investments, both organic and inorganic, toward capability and offering growth, technology development, and human capital development, along with the innovations that the service provider develops with its partners, are critical aspects of this dimension.

Research methodology and coverage

Avasant based its analysis on several sources:

Public disclosures	Publicly available information such as Securities and Exchange Commission (SEC) filings, annual reports, quarterly earnings calls, and executive interviews and statements
Market interactions	Discussions with enterprise executives leading digital initiatives and influencing provider selection and engagement
Provider inputs	Inputs collected through an online survey and structured briefings between August 2023 and October 2023

Of the 35 service providers assessed, the following are the final 25 providers featured in the RadarView for 2023–2024:

Note: Assessments for Accenture, Atos, Birlasoft, Coforge, Capgemini, Cognizant, DXC, Firstsource, Genpact, Hexaware, IBM, NTT Data, TCS, UST, and Wipro were conducted based on public disclosures and market interactions only.

Reading the RadarView

Avasant recognizes intelligent automation service providers in four classifications:

Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, partner ecosystem, and investments and innovation) and have had a superior impact on the marketplace. These providers have shown true creativity and innovation and have established trends and best practices for the industry. They have proven their commitment to the industry and are recognized as thought leaders in their space, setting the standard for the rest of the industry to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.

Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate a few select areas or industries and distinguish themselves based on superior innovation. These radicals are always hungry to create pioneering advancements in the industry and are actively sought after as trailblazers, redefining the rules of the game.

Disruptors enjoy inverting established norms and developing novel approaches that invigorate the industry. These providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, resulting in tectonic shifts. While disruptors might not have consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their areas of specialization.

Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the industry. Challengers have a track record of delivering quality projects for their most demanding Global 2000 clients. In select areas and industries, challengers might have capabilities that match or exceed those of the providers in other categories.

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Key contacts

Primary contact:

Chandrika Dutt
Associate Research Director
chandrika.dutt@avasant.com

Contributors:

Libby Roney
Distinguished Fellow at Avasant
libby.roney@avasant.com

Anupam Govil
Managing Partner and Digital Practice Lead
anupam.govil@avasant.com

Swapnil Bhatnagar
Partner
swapnil.bhatnagar@avasant.com

Abhisekh Satapathy
Lead Analyst
abhisekh.satapathy@avasant.com

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