iSG Provider Lens™

Intelligent Automation Services

A research report comparing provider strengths, challenges and competitive differentiators

Table of Contents 🏠

In 2024, intelligent automation service providers offer comprehensive automation strategies, integrating evolving technological capabilities with the potential of scaling across an entire organization. Enterprises are formalizing agility, resiliency and sustainability objectives to accelerate digital business transformation. Customer-centric design, purpose-built automation and business experience are critical factors for every enterprise to build distinguished performance metrics. AI-powered solutions embedded with GenAI functionalities and fine-tuned models for every business vertical and service line are being assessed to drive business growth. Hyperscalers and independent software vendors are building strategic relationships with global system integrators (GSIs) and other service providers to leverage domain data and process knowledge for resolving and modernizing industry processes.

Enterprises are investing to operationalize GenAI usage, ROI and use cases through diverse intelligent automation (IA) technology stacks. Data generation and capitalization, hybrid infrastructure observability, knowledge curation and enterprise process optimization are crucial facets to build a sustainable automation offerings portfolio. Governance, risk and compliance (GRC) and environmental and social attributes are core considerations for developing responsible automation practices. The high demand for multimodal talent has prompted GSIs to invest in talent transformation programs to upskill their workforce.

Service providers navigate data privacy challenges cautiously and implement safeguards to ensure ethical and reliable AI deployment. GSIs leverage digital engineering practices to innovate and drive strategic foresight for sustainable digital transformation and growth within the IA industry.

INTELLIGENT AUTOMATION SERVICES – 2024: DEEP VIEW

QUADRANTS

SECTIONS & COMPONENTS

CORNERSTONES

INTELLIGENT ENTERPRISE AUTOMATION

Integrated AI-powered Solutions
(GenAI Augmentation - Finetuned Models)

Corporate
(Functions & Organizational Ops)

HR & Recruitment	Finance & Accounting	Legal & Compliance	Other functions

Business
(Business Solutions)

Core Industry Processes Transformation

ARTIFICIAL INTELLIGENCE FOR IT OPERATIONS (AIOPS)

Integrated AI-powered Solutions
(Observability – Orchestration – Optimization)

On-prem Infrastructure

Application

Cloud

AI – IA Capabilities

Autonomous ITOps	Predictive Analytics	GenAI Knowledge Automation In ITOps

NEXT-GEN AUTOMATION

Resolving Customer & Industry Challenges
(Present & Future)

GenAI + Automation

Strategy	Operationalization

Change Mgmt. & User Centric Design

Competency & Certifications	Design Thinking Methodology

Bot Sustainability & Future Value Delivery

Framework	Solutions

Experience & Engagement
Employee | User | Customer | Digital | Total

Investment & R&D
Innovation | Cloud

Partnerships & Alliances
Investment | GTM | Co-build | Co-innovate

ESG
Sustainability | Carbon Impact | Resource Usage | Social & Environmental Impact

Responsible Automation
GRC | Ethical | Transparent | Accountable | Security

EXECUTION & VALUE

Emphasis on GSI's **intelligent automation ability** to drive **digital transformation** across **IT,** business services and corporate functions.

Simplified Illustration Source: ISG 2024

Intelligent Enterprise Automation

Artificial Intelligence for IT Operations (AIOps)

Next-Gen Automation
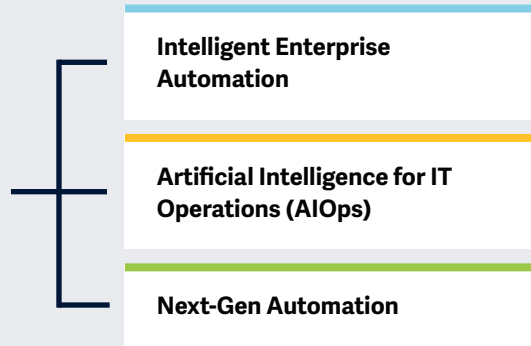
Scope of the report

The ISG Provider Lens™ Intelligent Automation Services study offers the following to business and IT decision makers:

- Transparency on the strengths and weaknesses of relevant providers.
- A differentiated positioning of providers by segments on their competitive strengths and portfolio attractiveness.
- Focus on different markets, including the U.S. and Europe.

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 their current vendor relationships and potential engagements.

Intelligent Enterprise Automation

Definition

This quadrant analyzes service providers and GSIs that design, develop and deliver solutions across business and organizational portfolios. These solutions are developed using proprietary1 platforms and AI-powered solutions and frameworks, along with associated services, such as consulting, advisory, implementation and ongoing support for proprietary offerings, that enable enterprises to augment their respective workforces' capabilities. These solutions and platforms can be implemented in any area of an enterprise, thus expanding the scope of automation from business services (industry verticals) to internal corporate functions like finance and accounting (F&A), HR, legal and compliance, and supply chain operations. The solutions supplement automation with advanced analytics and AI capabilities, such as computer vision, ML or deep learning and natural language processing (NLP), to transform an enterprise's business operations. The purpose is to eliminate inefficiencies, modernize processes, enhance data accuracy and optimize EX and CX. Incorporating fine-tuned LLMs (large language

models) and SLMs (small language models) into workflows is a priority for transforming enterprise processes. GenAI functionalities augment and expand the capability to articulate, summarize and contextualize process outcomes. GSIs are avidly exploring ways to improve their core competencies in intelligent enterprise automation.

Note1: By proprietary solution, we mean a solution developed internally, composed 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.

Eligibility Criteria

1. **Must offer proprietary automation AI platforms and solutions,** packages specific to industries and functions, and perpetual support for end-to-end business and corporate function transformation

2. **Must support integration with various enterprise applications** such as CRM and ERP systems

3. **Must facilitate automation with strong advisory abilities** for internal buy-in and guidance through the business transformation journey

4. **Must offer innovative** APIs, multi-tenancy and **secure platform deployment**

5. **Must have experience in advising, developing** and **deploying industry-focused** and **function-specific automation solutions**

6. **Must showcase** existing **GenAI integrations** (beta or production-ready) across various enterprise use cases

7. **Must highlight partnerships** (with hyperscalers and ISVs) and **investments in R&D** to advance future GenAI development

Artificial Intelligence for IT Operations (AIOps)

Definition

This quadrant analyzes IT service providers and GSIs that offer proprietary AIOps solutions, platforms and frameworks that enable enterprises to monitor a distributed IT infrastructure, understand IT behavior under dynamic conditions and orchestrate and optimize it. AIOps leverages AI and ML tools, predictive analytics, knowledge automation using GenAI and advanced solutions to facilitate enterprises' multicloud and hybrid cloud workloads. It must also offer real-time insights, event correlation and telemetry from configuration items across cloud and hosted infrastructure. Practicing AIOps helps companies detect tech events that lead to adverse impacts on the business. Such solutions and frameworks redefine the IT operations model by combining conversational AI, document intelligence and process mining components with automation, providing complete visibility into an enterprise's IT landscape. GenAI applications use text, image and code generation and autonomous knowledge processing to aid algorithms in improving anomaly detection, observability,

predictive maintenance, log analysis and event correlation. GenAI has simplified the complex initial stages of modeling IT operations by generating knowledge and automation scripts. In the final stage, GenAI acts as an intelligent assistant for seamless communication and intuitive insight consumption, leading to rapid incident resolution.

Note: This quadrant focuses on proprietary solutions (in-house built, potentially using open source or commercially licensed components but not tied to a specific component vendor) for autonomous multicloud workload operation. These solutions leverage AI, ML and big data developed by IT service providers to ensure that an enterprise's multicloud workload operation can be anonymously supported.

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

Eligibility Criteria

1. **Must offer a custom-built solution** to manage and administer IT infrastructure, applications and CloudOps

2. **Must consolidate events and take predefined intelligent actions**, including resolution, assignment and related subsequent steps

3. **Must demonstrate GenAI solutions** actively used within existing IT operations. Must have a **detailed GenAI strategy and roadmap**, emphasizing partnerships with hyperscalers or ISVs

4. **Must deliver scalable, real-time insights and proactive** analysis to enhance IT visibility. Must **leverage AI and ML** for automated service resilience and data-driven recommendations

5. **Must offer** flexible **data visualization**, support **data injection from multiple sources**, enable **automated pattern discovery** and provide **innovative APIs** for seamless multicloud integration

6. **Must act as a smart orchestration engine in workflow creation**, with a nearly **zero-touch** or **one-touch** approach

Next-Gen Automation

Definition

This quadrant assesses service providers' approaches to building a next-gen sustainable automation roadmap, covering innovation, organizational adoption of automation, talent strategy and bot development standards using the latest technologies and frameworks. It focuses on a business-centric automation approach encompassing low-code/no-code (LCNC) development offerings and emphasizing the development of new skills that maximize automation benefits. It also assesses service providers' capacity to support organizational adaptation through change management, training and technology upgrades aligned with platform advancements. Intelligent automation (IA) is emerging as a key strategic initiative to deliver efficiency with the evolving environmental, social and governance (ESG) landscape through resource optimization and streamlined ESG reporting processes.

Concurrently, GenAI has intensified the focus on ethical AI-powered automation practices governed by automation CoEs to protect enterprise data. Enterprises prioritize operating models that adhere to industry standards and data protection regulations. Providers must demonstrate capabilities to build automation solutions and have platform certifications, functional knowledge, industry expertise and a clear strategy for resource upskilling and cross-skilling via partner training programs. They are required to adopt user-centered design (UCD) principles to differentiate themselves with customized workflows. As new forms of GenAI, beyond text, image and code generation, e.g., with one-bit models, energy-efficient LLMs and SLMs, vertical and functional RAGs, etc., evolve, there are emerging new use cases. Providers should also have emerging offerings around GenAI.

Eligibility Criteria

1. **Must facilitate** a **seamless transition across users and stakeholders**, ensuring external (clients) and internal (employees) entities are well-managed and educated on automation

2. **Must demonstrate** the **ability** to **build future-ready solutions, leveraging UCD** and the **latest technologies**

3. **Must have** the **ability** to drive **implementation** and **integration** capabilities **using** the latest, **innovative technologies**

4. **Must use frameworks, methodologies** and **reference architecture** to **develop bots** (DevOps, CI/CD and LCNC)

5. **Must demonstrate** the **ability** to **design** and **implement GenAI across business** and **technology domains**. This includes showcasing a **clear GenAI strategy**, operationalization initiatives, **existing partnerships** (including with hyperscalers and ISVs), **R&D investments** and a **roadmap** for **future applications** and **development**

Quadrants by Region

As a part of this ISG Provider Lens™ quadrant study, we will assess the following three quadrants of Intelligent Automation Services 2024:

Quadrant	U.S.	Europe
Intelligent Enterprise Automation	✔	✔
Artificial Intelligence for IT Operations (AIOps)	✔	✔
Next-Gen Automation	✔	✔

The research phase falls in the period between July and August 2024, during which survey, evaluation, analysis and validation will take place. The results will be presented to the media in December 2024.

Milestones	Beginning	End
Survey Launch	July 10, 2024	
Survey Phase	July 10, 2024	August 10, 2024
Sneak Previews	November 2024	December 2024
Press Release & Publication	December 2024	

Collecting client testimonials via the Star of Excellence Program requires early client referrals (no official reference needed) because CX scores have a direct influence on the provider's position in the IPL quadrant and the awards.

Please refer to the link to view/download the ISG Provider Lens™ 2024 research agenda.

Access to Online Portal

You can view/download the questionnaire from here using the credentials you have already created or refer to instructions provided in the invitation email to generate a new password. We look forward to your participation!

Research Production Disclaimer:

ISG collects data for the purposes of writing research and creating provider/vendor profiles. The profiles and supporting data are used by ISG advisors to make recommendations and inform their clients of the experience and qualifications of any applicable provider/vendor for outsourcing the work identified by clients. This data is collected as part of the ISG FutureSource™ process and the Candidate Provider Qualification (CPQ) process. ISG may choose to only utilize this collected data pertaining to certain countries or regions for the education and purposes of its advisors and not produce ISG Provider Lens™ reports. These decisions will be made based on the level and completeness of the information received directly from providers/vendors and the availability of experienced analysts for those countries or regions. Submitted information may also be used for individual research projects or for briefing notes that will be written by the lead analysts.

ISG Star of Excellence™ – Call for nominations

The Star of Excellence™ is an independent recognition of excellent service delivery based on the concept of "Voice of the Customer." The Star of Excellence™ is a program, designed by ISG, to collect client feedback about service providers' success in demonstrating the highest standards of client service excellence and customer centricity.

The global survey is all about services that are associated with IPL studies. In consequence, all ISG Analysts will be continuously provided with information on the customer experience of all relevant service providers. This information comes on top of existing first-hand advisor feedback that IPL leverages in context of its practitioner-led consulting approach.

Providers are invited to nominate their clients to participate. Once the nomination has been submitted, ISG sends out a mail confirmation to both sides. It is self-evident that ISG anonymizes all customer data and does not share it with third parties.

It is our vision that the Star of Excellence™ will be recognized as the leading industry recognition for client service excellence and serve as the benchmark for measuring client sentiments.

To ensure your selected clients complete the feedback for your nominated engagement please use the Client nomination section on the Star of Excellence™ website.

We have set up an email where you can direct any questions or provide comments. This email will be checked daily, please allow up to 24 hours for a reply.

Here is the email address:
ISG.star@isg-one.com

ISG Star of Excellence

Methodology & Team

The ISG Provider Lens 2024 – Intelligent Automation Services research study analyzes the relevant software vendors/service providers in the global market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

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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 July 2024, 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 Advisors Involvement Program

ISG Provider Lens offers market assessments incorporating practitioner insights, reflecting regional focus and independent research. ISG ensures advisor involvement in each study to cover the appropriate market details aligned to the respective service lines/technology trends, service provider presence and enterprise context.

In each region, ISG has expert thought leaders and respected advisors who know the provider portfolios and offerings as well as enterprise requirements and market trends. On average, three advisors participate as part of each study's quality and consistency review team (QCRT). The QCRT ensures each study reflects ISG advisors' experience in the field, which complements the primary and secondary research the analysts conduct. ISG advisors participate in each study as part of the QCRT group and contribute at different levels depending on their availability and expertise.

The QCRT advisors:

- Help define and validate quadrants and questionnaires,

- Advise on service provider inclusion, participate in briefing calls,

- Give their perspectives on service provider ratings and review report drafts.

ISG Advisors to this study

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Partner, ISG Automation

Anurag Saxena

Partner, ISG Automation

Invited Companies

If your company is listed on this page or you feel your company should be listed, please contact ISG to ensure we have the correct contact person(s) to actively participate in this research.

* Rated in previous iteration

Accenture*	Deloitte*	KPMG*	Sutherland*
All for One Group*	DXC Technology*	Kyndryl*	TCS*
Almato	Eviden (Atos)*	LTIMindtree*	Tech Mahindra*
Arvato Systems*	Exela Technologies	Marlabs*	Tietoevry*
Aspire Systems*	EXL*	Microland*	T-Systems*
Axians*	EY*	Movate*	UST*
Birlasoft*	Firstsource	Mphasis*	Virtusa
CANCOM*	Fujitsu*	NTT DATA*	Wipro*
Capgemini*	GAVS*	Persistent Systems*	WNS-Vuram*
Capita	Genpact*	PwC*	Xceedance*
CGI*	HCLTech*	Quantiphi	Zensar*
Coforge	Hexaware*	Reply	
Cognizant*	IBM*	Softtek*	
DATAGROUP*	Infosys*	Sonata Software*	
Datamatics	ITC Infotech*	Sopra Steria	

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

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ISG

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Founded in 2006, and based in Stamford, Conn., ISG employs 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.

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JULY, 2024

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