

Intelligent Automation – Services and Solutions

A research report comparing provider strengths,
challenges and competitive differentiators

Customized report courtesy of:



Executive Summary	03
Provider Positioning	06
Introduction	
Definition	10
Scope of Report	11
Provider Classifications	12
Appendix	
Methodology & Team	33
Author & Editor Biographies	34
About Our Company & Research	36

Intelligent Enterprise Automation	13 – 27
Who Should Read This Section	14
Quadrant	15
Definition & Eligibility Criteria	16
Observations	17
Provider Profile	19

Artificial Intelligence for IT Operations (AIOps)	20 – 25
Who Should Read This Section	21
Quadrant	22
Definition & Eligibility Criteria	23
Observations	24
Provider Profile	25

Next-Gen Automation	26 – 31
Who Should Read This Section	27
Quadrant	28
Definition & Eligibility Criteria	29
Observations	30
Provider Profile	31

Report Author: Mark Purdy

Generative AI is set to revolutionize the market for intelligent automation services in Europe

The intelligent automation ecosystem of service providers in Europe continues to evolve in technology complexity, enterprise needs and the scope and maturity of service provider offerings. With enterprise automation requirements ratcheting up, technology providers and global system integrators are under greater pressure than ever to differentiate their intelligent enterprise automation (IEA) offerings and demonstrate an ability to drive measurable business performance improvements from automation initiatives.

Several broad trends characterize the changing landscape for IEA in Europe.

First, *hyperautomation* is very much the order of the day, by which we mean the ability to drive end-to-end intelligent automation across

complex processes and different departments of an organization. Hyperautomation initiatives require service providers to demonstrate mastery of a range of next-generation technologies — process discovery, RPA, conversational AI, data estate modernization, IoT and database management, to name but a few — and orchestrate these efficiently across hybrid and multicloud environments. Discrete RPA and piecemeal automation still occur but are increasingly considered inefficient, creating technical debt that impedes broader innovation efforts. More and more enterprises see hyperautomation as key to advancing their more comprehensive digital transformation efforts, as it increases enterprise self-service capabilities, accelerates product and service release cycles and enables greater personalization of consumer, employee and user experiences. IEA service providers bring important strategic consulting and industry expertise to these hyperautomation initiatives, advising on the correct sequencing and prioritization of automation candidates, implementing industry and domain use cases and, importantly, helping address the

Leaders are
investing heavily
in GenAI tools,
solutions and
use cases.



Executive Summary

broader organizational culture and workforce disruptions that intelligent automation inevitably creates.

By far the biggest disruption in recent times to the IEA landscape is the emergence of generative AI (GenAI) and large language models (LLMs) that can comb vast tracts of data — text, numbers, software code, images, video, sounds and more — to analyze their probabilistic structure and model the characteristics of such data in a highly efficient way. GenAI has several functions set to revolutionize nearly every aspect of how intelligent automation is done within organizations. First, GenAI brings advanced search and knowledge assembly capabilities: with a well-framed question from a human prompter, GenAI algorithms can rapidly answer questions and extract relevant information, for example, from technical manuals, organizational databases or external third-party sources. Second, there is the creative side of GenAI: LLMs can, based on simple prompts, create custom emails, research reports, marketing content, software code, lead generation suggestions in sales, custom videos

from text and many other types of content. Third, GenAI models bring important prediction and simulation capabilities, for example, to understand the impact of alternative decisions or different business process combinations. ISG discussions and briefings with providers indicate that most leading providers are already investing significantly in GenAI capabilities, primarily at this stage through beta versions, PoC and preview versions of tools. However, some providers already have commercially available GenAI services. Providers generally build their GenAI use cases based on external proprietary or open source LLMs, such as Open AI's GPT, Google's Bard, Meta's LLaMA, Anthropic's Claude or Cohere. A few are building their own LLMs.

Providers are developing an extensive set of use cases for GenAI to be used in intelligent automation initiatives. These include knowledge management, drug discovery, regulatory document summaries, automated medical transcriptions, omnichannel marketing, language translation, prediction of customer churn in telecoms and personalized travel recommendations. In insurance, for example,

GenAI can extract relevant details from arcane policy documents to check policyholder coverage rules for both insurance staff and customers; it can help underwriters assess risk when triaging policies, and it can help speed up claims processing and improve fraud detection. In retail, it can generate detailed product descriptions for e-commerce sites, translate languages, optimize store layouts and provide personalized customer recommendations. One of the biggest applications of GenAI will be in customer contact centers, where GenAI is already being infused into virtual chatbots to give them more human-like conversational capabilities, as well as into agent assist systems that accouter customer contact agents with real-time information to answer customer queries. Another big application area is in IT itself; GenAI copilots are being used extensively to help developers create, complete and check software code in different programming languages, dramatically improving the speed and efficiency of software development cycles.

Despite the undoubted promise of GenAI and broader hyperautomation initiatives, many challenges remain. Trust in human-machine

interactions is still far from complete. Data challenges — from unstructured, siloed or simply poor-quality data — abound. Enterprises still often struggle to identify suitable candidates for automation and to align these with broader business goals and performance. Legacy systems — from previous piecemeal automation efforts or third-party software — can make hyperautomation a hazardous and costly exercise as enterprises face the prospect of struggling with a multitude of licensing costs. Enterprises also face a thicket of regulatory and ethical issues relating to AI, especially in Europe. Most importantly, enterprises are still grappling with intelligent automation's human and cultural aspects, with worker resistance to automation still widespread in many organizational settings. Most intelligent automation service providers are finding increased demand for their change management capabilities from enterprises as they seek to navigate these organizational and cultural challenges.

Yet the prospects for intelligent automation services in Europe remain bright. ISG briefings and discussions with providers reveal that most



providers see growing demand for automation by European enterprises and a strong interest in the potential applications of GenAI. Demand for automation is partly driven by labor shortages and increasing business costs in many markets; however, enterprises also see it as a top-line driver of growth through its ability to drive enhanced consumer and user experiences. However, budget constraints continue to be a challenge; while many enterprises are pursuing large-scale deployments, others are still compelled to take an incremental approach to gain funding for more significant initiatives. Due to the diversity across Europe, demand patterns and buyer values can significantly differ from one market to another. Different labor laws and societal attitudes influence the acceptance and progress of automation to some extent. All European providers have to pay significant attention to GDPR and EU regulations around AI. Automation solutions usually need to be localized and respect language and cultural differences. European enterprises are also concerned with the sustainability aspects of automation, for example, the extent to which intelligent automation can help reduce carbon

impacts. Patterns of industry demand vary, but, in general, demand is more robust in sectors such as energy, utilities, manufacturing, finance and automotive. Demand for automation by manufacturers has been given a fillip by European manufacturing enthusiasm for Industry 4.0 initiatives. Demand in the public sector and healthcare lags to some degree.

Providers seek to help enterprises with intelligent automation technology adoption and integration and broader organizational, cultural, regulatory and data challenges of intelligent automation implementation. Demand for organizational change management services, in particular, has surged.





Provider Positioning

Page 1 of 4

	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
Accenture	Leader	Leader	Leader
All for One Group	Not In	Contender	Not In
Arvato Systems	Product Challenger	Not In	Contender
Axians	Not In	Product Challenger	Not In
Birlasoft	Contender	Not In	Contender
CANCOM	Not In	Contender	Not In
Capgemini	Leader	Leader	Leader
CGI	Product Challenger	Product Challenger	Contender
Cognizant	Leader	Product Challenger	Leader
DATAGROUP	Not In	Product Challenger	Not In





Provider Positioning

Page 2 of 4

	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
Deloitte	Not In	Not In	Product Challenger
DXC Technology	Product Challenger	Product Challenger	Contender
Eviden (Atos)	Product Challenger	Product Challenger	Leader
EXL	Rising Star ★	Not In	Product Challenger
EY	Not In	Not In	Product Challenger
Fujitsu	Not In	Not In	Product Challenger
Genpact	Market Challenger	Not In	Contender
HCLTech	Leader	Leader	Product Challenger
Hexaware	Product Challenger	Product Challenger	Not In
IBM	Market Challenger	Market Challenger	Not In





	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
Infosys	Leader	Product Challenger	Product Challenger
ITC Infotech	Contender	Not In	Not In
Kyndryl	Not In	Product Challenger	Not In
LTIMindtree	Product Challenger	Product Challenger	Contender
Marlabs	Contender	Not In	Not In
Microland	Not In	Product Challenger	Not In
Mphasis	Product Challenger	Contender	Contender
NTT DATA	Market Challenger	Market Challenger	Product Challenger
Persistent Systems	Product Challenger	Contender	Product Challenger
PwC	Product Challenger	Not In	Product Challenger





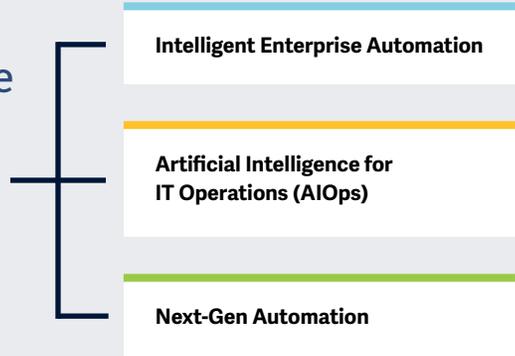
Provider Positioning

Page 4 of 4

	Intelligent Enterprise Automation	Artificial Intelligence for IT Operations (AIOps)	Next-Gen Automation
TCS	Leader	Leader	Product Challenger
Tech Mahindra	Product Challenger	Contender	Product Challenger
Tietoevry	Leader	Leader	Leader
T-Systems	Product Challenger	Product Challenger	Contender
UST	Product Challenger	Product Challenger	Not In
Wipro	Leader	Leader	Rising Star ★
WNS-Vuram	Product Challenger	Not In	Product Challenger



Focus on the service provider's ability to **automate** and **transform** the **IT landscape**, **business services** and **corporate functions**.



Simplified Illustration; Source: ISG 2023

Definition

The Intelligent Automation Services and Solutions study focuses on the capabilities of automation service providers and global system integrators (GSIs) to offer consulting, implementation and support services across enterprise portfolios. The evaluation covers the GSIs' and service providers' ability to harness automation for transforming business services, corporate functions and the IT landscape with proprietary solutions and accelerators and using a lifecycle management approach.

Intelligent automation (IA) services are advancing into a critical maturity phase to design solutions for complex business processes and industry focus areas. IA is expanding across boundaries and silos of IT, business and functional regions to drive service providers to build proprietary platforms. These services are evolving rapidly, accommodating internal and external components and elevating the quality and capability of existing solutions.

The IA services market is becoming more competitive and consolidated as leading players expand their capabilities across the IA stack

and offer end-to-end solutions for enterprise-wide automation. The market proliferates as service providers leverage their domain expertise, technology partnerships and delivery models to provide value-added services for IA implementation, integration, management and optimization.

Generative AI has emerged as a significant trend, leading many service providers and GSIs to invest heavily in developing and facilitating the integration of generative AI capabilities for enterprise clients. These advancements hold tremendous potential for enhancing business productivity and uncovering untapped value within organizations. Currently, service providers and GSIs are aggressively partnering with hyperscalers and specialized generative AI ISVs to train large language models (LLMs) for enterprise use.



Scope of the Report

This ISG Provider Lens™ quadrant report covers the following three quadrants for services and solutions: Intelligent Enterprise Automation, Artificial Intelligence for IT Operations (AIOps) and Next-Gen Automation.

This ISG Provider Lens™ study offers IT decision-makers:

- Transparency on the strengths and weaknesses of relevant providers
- A differentiated positioning of providers by segments (quadrants)
- Focus on the European market

Our study serves as the basis for important decision-making by covering providers' positioning, key relationships and go-to-market considerations. ISG advisors and enterprise clients also use information from these reports to evaluate their existing vendor relationships and potential engagements.

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 \$20 million and \$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 \$1 billion, with activities worldwide and globally distributed decision-making structures.

The ISG Provider Lens™ quadrants are created using an evaluation matrix containing four segments (Leader, Product Challenger, Market Challenger and Contender), and the providers are positioned accordingly. Each ISG Provider Lens™ quadrant may include service providers that ISG believes have 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).





Provider Classifications: Quadrant Key

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.

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 products/ services and a follow sensible market approach with a goal of becoming a Product or Market Challenger within 12 to 18 months.

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.

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.

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

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





Intelligent Enterprise Automation

Intelligent Enterprise Automation

Who Should Read This Section

This quadrant report is relevant to Europe-based enterprises for evaluating service providers offering proprietary intelligent enterprise automation (IEA) solutions and implementation, advisory and support services. ISG highlights the market positioning of the IEA service providers in Europe, demonstrating how they tackle enterprise challenges.

The IEA landscape in Europe has dynamically advanced, adopting technological advancements through a fusion of process discovery, analytics, RPA tools, low-code/no-code (LCNC) platforms and business process management. However, enterprises need help with disjoint automation strategies, leading to difficulties in continuous management and enhancement of automation initiatives. This could arise because of a need for a distinct understanding of how automation integrates into the broader operational landscape. Inadequate data availability and quality, difficulty identifying and prioritizing automation processes, long procurement cycles, data and

quality governance and increasing licensing costs are other vital challenges European enterprises face.

GenAI integration with IEA enhances business productivity and optimizes operations by refining process scalability and efficiency. However, it necessitates authentic data for model training to prevent hallucination.

Providers mitigate enterprise challenges through industry-specific offerings, reducing onboarding costs, predictive recommendations and cloud-based automation solutions.

Enterprises increasingly adopt hyperautomation for end-to-end automation. Increased data privacy regulations in Europe have necessitated providers to align their automation offerings with ethical measures enforced by government regulatory bodies.



Strategy professionals should read this report to understand providers' capabilities to facilitate automation with end-to-end IEA solutions and deliver the required benefits efficiently.



Digital professionals should read this report to understand how IEA solutions align with their digital transformation initiatives and how providers compare.



Technology professionals should read this report to understand how IEA providers integrate the latest technologies and capabilities into their proprietary offerings to gain a competitive edge.

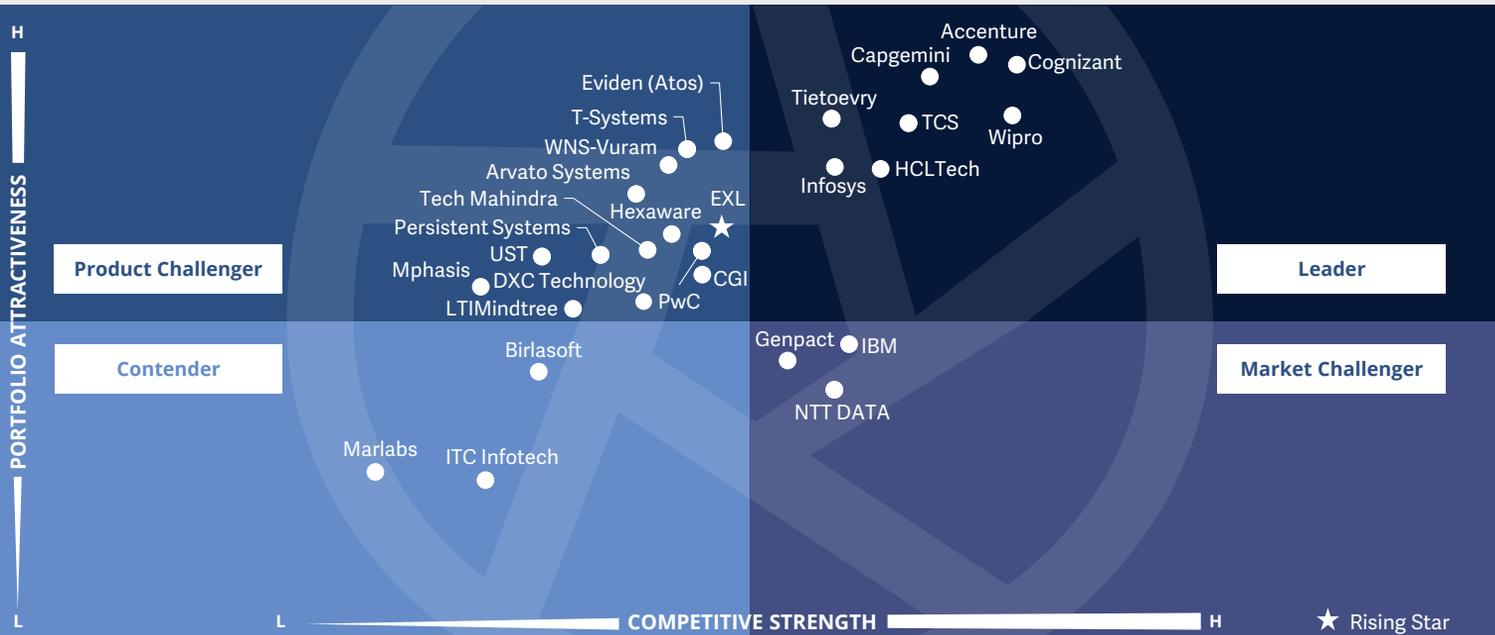


Procurement professionals should read this report to better understand the current landscape of IEA service providers in Europe.



Intelligent Automation – Services and Solutions
Intelligent Enterprise Automation

Europe 2023



This quadrant assesses providers of IEA **services, solutions and tools**.

Providers are creating **GenAI-powered tools and assets** to accelerate the next wave of automation adoption.

Mark Purdy



Intelligent Enterprise Automation

Definition

This quadrant analyzes providers for services offered across business process outsourcing and corporate functions using automation and proprietary AI platforms, solutions and frameworks, long with associated services that enable enterprises to augment their respective workforce's capabilities. These solutions and platforms can be implemented in any area of an enterprise, thus expanding the scope of automation from business services to internal corporate functions that involve repetitive and manual processes but are primarily used in finance and accounting (F&A), HR, procurement and supply chain functions. The solutions supplement automation with advanced analytics and AI technologies, such as computer vision, ML or deep learning and NLP to digitally transform an enterprise's business operations at scale. They aim to eliminate inefficiencies and facilitate reduced costs, increased productivity, improved data accuracy and enhanced employee and customer experiences. As generative AI capabilities in the form of text, image and code generation can enhance operational efficiency and business

outcomes, service providers and GSIs are avidly exploring opportunities to improve their core competencies in intelligent enterprise automation.

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

***Note 2:** *By 'proprietary solution,' we mean a solution built or grown by 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.*

Eligibility Criteria

- 1. Proprietary automation AI platform:** Must offer a proprietary automation AI platform and solutions, along with packages specific to industries and functions, as well as perpetual support
- 2. End-to-end business and corporate function transformation:** Capability to design, develop and deploy solutions using next-gen technologies such as automation, AI and advanced analytics
- 3. Integration with enterprise data and applications:** Must support integration with different enterprise applications such as CRM and ERP systems for access to customer data, finance and existing IT infrastructure
- 4. Customization and personalization of solutions:** Capable of offering out-of-the-box APIs, multi-tenancy and secure deployment of platforms
- 5. Automation opportunity assessment capabilities:** Must facilitate automation with strong advisory abilities for internal buying and guide through business transformation journey, showcasing how advisory expertise and pretrained models can result in positive business outcomes
- 6. Industry- or function-specific solutions and packages:** Must have experience in advising, developing and deploying industry-focused and function-specific (for example, finance, procurement and HR) automation/AI proprietary solutions
- 7. Demonstrate generative AI capabilities:** Must have generative AI capabilities across various enterprise use cases. Solutions must either be in the beta phase or currently leveraged with the existing corporate and business enterprise operations
- 8. Showcase generative AI strategy and partnerships:** Must highlight the current strategy to use generative AI and emphasize any partnerships with hyperscalers or ISVs. Should have invested in R&D and made road maps for future applications and development



Intelligent Enterprise Automation

Observations

The IEA provider landscape is entering a new phase, driven by enterprise demand for hyperautomation and the emergence of GenAI as a major technology disruptor. ISG discerns several trends within this space in Europe. First, nearly all of the leaders are making significant investments in GenAI, often in the billions of dollars range, focusing on developing GenAI-powered use cases and infusing LLM capabilities into existing automation offerings. Such investments are occurring in tandem with major GenAI talent-building programs, either by recruiting new talent or by cross-skilling existing workers. Given the pervasive impact of GenAI, providers often have tiered programs of training, with some components focused on general awareness training around GenAI for business users and others centered on specialist training for ML engineers that will be at the sharp end of creating LLM-based applications and tools. Second, providers are developing platforms and services that help enterprises create their own GenAI automation solutions, for example, through developer studios or experiment-as-a-service models.

Third, providers are finding that this new phase of hyperautomation is creating a need for complementary services, such as organizational change management, to address the cultural and communication aspects of automation or data estate modernization to provide a sounder data foundation for GenAI solutions. Fourth, providers are actively forging new partnerships and alliances, especially in the GenAI space, notably with the hyperscalers but also with major semiconductor companies and smaller, specialized firms.

From the 46 companies assessed for this study, 28 qualified for this quadrant, with eight being Leaders and one Rising Star.

accenture

Accenture plans to invest \$3 billion in GenAI over the next three years, substantially expanding its data and AI practice and doubling its current talent pool to 80,000 people. It has launched a new platform, AI Navigator for Enterprise.

Capgemini

Capgemini is making significant investments in GenAI for enterprise automation, with plans to double its data and AI workforce over the next three years. It also explores frontier areas of GenAI, such as prompt hydration (the automation of prompt engineering).

cognizant

Cognizant is expanding its presence in the IEA services space in Europe, appointing new growth market leadership for the region and building partnerships with key automation players in the region, such as Celonis and SS&C Blue Prism.

HCLTech

HCLTech offers a comprehensive set of IEA services, primarily through its hyperautomation suite and advantage DPA frameworks. It is also notable for its extensive range of point and domain automation solutions.

Infosys

Infosys has invested in AI-led automation for several years but has recently stepped up its investments in GenAI assets and talent. It has also concluded a series of strategic alliances with key players in the GenAI space, such as NVIDIA, Microsoft and AWS.

TCS TATA CONSULTANCY SERVICES

TCS offers a range of industry- and domain-specific solutions in the intelligent automation space. It has developed several GenAI offerings and solutions, particularly for helping enterprises create effective road maps for implementing GenAI.

tietoevry

TietoEVRY has invested significantly in new GenAI capabilities, working closely with the three major hyperscalers, especially Microsoft Azure, and also with OpenAI. It has considerable market traction for its IEA services in the Nordics region.



Intelligent Enterprise Automation



Wipro plans to invest \$1 billion in GenAI capabilities over the next three years. In July 2023, it launched ai360, styled as an AI-first ecosystem combining its data analytics, AI, cybersecurity and engineering capabilities.

EXL

EXL (Rising Star) offers a comprehensive approach to IEA, with a strong emphasis on data foundations and AI orchestrations. It has enjoyed a raft of recent wins in Europe and beyond.



Capgemini



“A comprehensive set of offerings and significant investments in GenAI make Capgemini a Leader in Intelligent Enterprise Automation.”

Mark Purdy

Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. The company provides intelligent automation solutions via its Enterprise Automation Fabric proprietary platform. There is a substantial demand for the company's IEA services in Europe, and the region features many resources specializing in intelligent automation.

Strengths

Comprehensive approach: Capgemini offers the full gamut of IEA services, encompassing advisory, solutioning (AI for HR, supply chain and more), integration (AI for RPA, AI for ERP and more), delivery (cloud AI, automated ML and more) and running of automation solutions (MLOps). It is also notable for its range of end-to-end IEA offerings in frictionless finance, connected business operations, people experience, connected marketing operations and carbon accounting as a service.

GenAI focus: Capgemini is making significant investments in GenAI, for example, in areas such as GenAI digital assistants in contact centers and GenAI for business operations, people, decisions (predictions and business insights) and automation (intelligent

document processing [IDP], text mining and more). It is exploring more than 150 use cases and plans to double its talent base in data and AI over the next three years, recruiting 60,000 people.

Prompt hydration: Capgemini is working in some frontier areas of GenAI, such as prompt hydration, which refers to the automation of the prompts used to elicit responses from GenAI systems (typically done by a human). This cutting-edge work promises to increase the reliability of LLM outputs while also increasing efficiency in using LLM models.

Caution

Capgemini should continue the velocity of its service and solution development as the IEA market is set for further disruption from GenAI over the next several years. It should also consider the impact of Europe-specific trends, such as increasing regulation of AI and data within the region.





Artificial Intelligence for IT Operations (AIOps)

Artificial Intelligence for IT Operations (AIOps)

Who Should Read This Section

This report is relevant to European enterprises for evaluating AIOps service providers. In this report, ISG highlights the current market positioning of AIOps service providers in Europe and shows how each provider addressed challenges faced by enterprises. This report also enables enterprises to evaluate emerging vendors to support their AIOps automation requirements.

In Europe, there's traction toward integrating AIOps into business operations, as companies are keen to transition away from traditional IT practices. Predictive analysis and GenAI inclusion in incident management capabilities, increased utilization of cloud technology, imperative for robust cybersecurity measures and integrating multiple data sources, such as logs, metrics and IT monitoring tools, influence the adoption of AIOps.

However, some challenges remain for enterprises, such as inaccurate assessment of the impact of a complex IT landscape, multivendor implementation, skills gap and resistance to cultural shift while implementing

AIOps automation, security concerns because of limited log visibility and lack of flexibility from distribution of corporate assets between cloud, digital and legacy systems.

European enterprises seek an agile strategy to manage intricate IT systems and infrastructure requirements. Providers mitigate enterprise challenges by including KPI metrics to measure value delivered by automation. AIOps tools integrate explainable AI to offer a transparent, comprehensible journey from data to decision, enhancing the trustworthiness and applicability of AI outcomes. Global service providers continue to innovate and have introduced zero-touch maintenance, which has preventive maintenance merged with auto-discovery of automation use cases. Global service providers are continually innovating, introducing zero-touch maintenance, a combination of preventive maintenance and automated discovery of automation use cases.



Strategy professionals should read this report to understand the relative positioning and capabilities of AIOps providers for improving the reliability of their technical and integration capabilities.



Digital professionals should read this report to understand how AIOps solutions providers fit in with their intelligent-automation-led digital transformation initiatives and their comparison.



Technology professionals should read this report to understand how AIOps providers undertake transformation initiatives and perform in complex environments to ensure smooth operations.

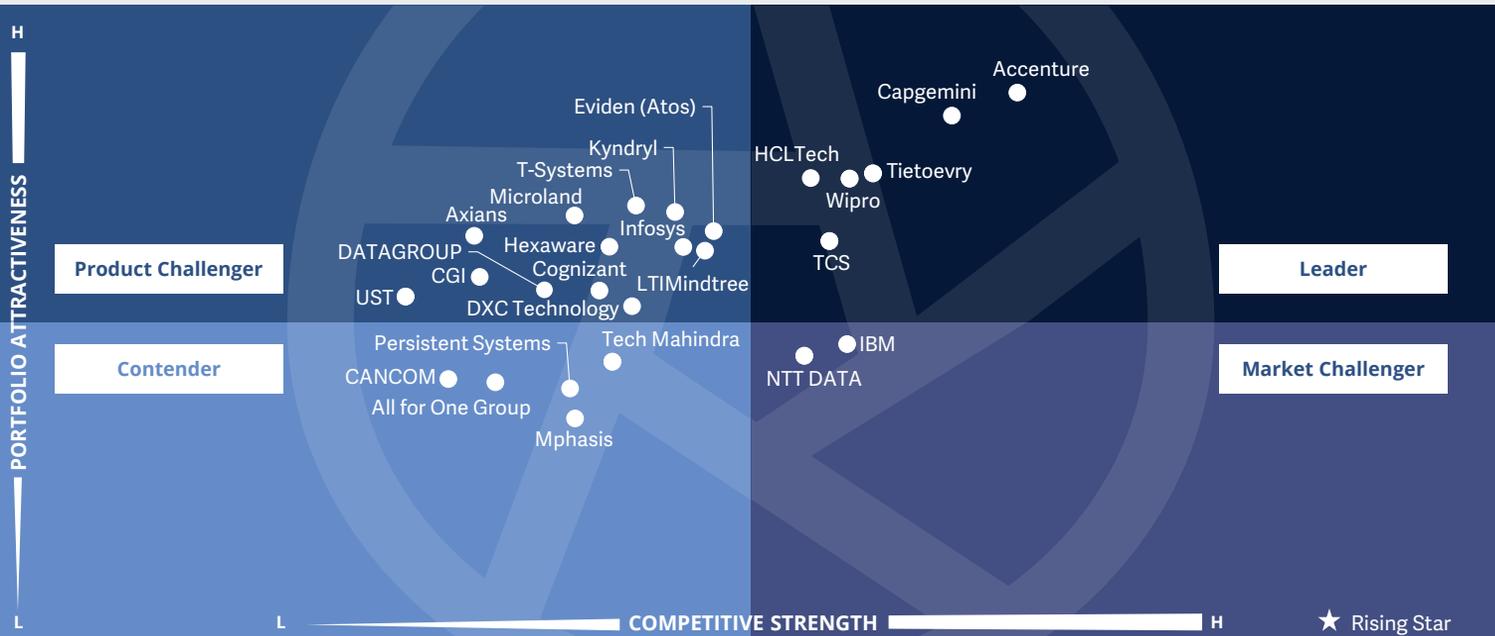


Procurement professionals should read this report to increase their comprehension of the current landscape of AIOps service providers in Europe and their suitability for RFPs.



Intelligent Automation – Services and Solutions
Artificial Intelligence for IT Operations (AIOps)

Europe 2023



This quadrant assesses providers that offer AIOps **services, solutions and related assets**.

Providers are creating **GenAI solutions** to accelerate **software development** and automate many aspects of **IT infrastructure and application services**.

Mark Purdy



Artificial Intelligence for IT Operations (AIOps)

Definition

This quadrant analyzes IT service providers 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 workflows or automated corrections. AIOps is a solution and framework that facilitates the understanding of a company's multicloud IT workloads and analyzes data to facilitate automated operations. It also offers real-time, minimal-cost solutions that allow companies to detect issues before they cause an adverse effect on the business. Such solutions and frameworks redefine the model of an IT operation by combining data patterns and human intelligence to provide full visibility into the IT landscape of an enterprise. Generative AI applications use text, image and code generation to aid algorithms in improving anomaly detection, observability, predictive maintenance, log analysis and event correlation. These capabilities aim to maximize the performance of distributed, heterogeneous,

multicloud IT workloads, reducing costs and ensuring compliance and security with higher efficiency.

***Note 1:** *This quadrant encompasses solutions/platforms/ecosystems/frameworks developed by IT service providers by investing in AI, ML and big data capabilities to help companies ensure that their multicloud workload operation can be supported autonomously.*

***Note 2:** *By "proprietary solution," we mean a solution built in-house and includes 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. Proprietary AIOps platform and framework:** A custom-built solution to manage and administer IT infrastructure, application and CloudOps
- 2. Event management and exception handling ability:** Must consolidate events from all sources (alerts and incidents) and categories and classify, evaluate and take predefined intelligent actions, including resolution, assignment and related subsequent steps
- 3. AI-driven scalable prebuilt solutions:** Provide companies with highly scalable, real-time data, along with an AI-driven prescriptive and proactive analysis to provide visibility into an IT landscape
- 4. Data visualization and projection capabilities:** Must offer data injection through multiple sources and provide automated pattern discovery and detection through the big data platform
- 5. Solution identification and recommendation:** Apply AI and ML in automated services to improve resilience and reduce the mean time to repair (MTTR)
- 6. Touchless IT operations:** Must act as a smart orchestration engine in workflow creation for a company's managed IT infrastructure, with a nearly zero- and one-touch approach
- 7. Solution customization and personalization:** Out-of-the-box APIs for multicloud and multitenancy and secure deployment of platforms
- 8. Demonstrate generative AI capabilities:** Generative AI capabilities across various enterprise use cases. The solution must either be in the beta phase or currently leveraged by the existing IT operations
- 9. Showcase generative AI strategy and partnerships:** Must highlight the current strategy of using generative AI and emphasize any partnerships with hyperscalers or ISVs, any R&D investment already made and a road map for future applications and development



Artificial Intelligence for IT Operations (AIOps)

Observations

AIOps is set to be transformed by the emergence of GenAI, which has already revolutionized many aspects of observability, IT management, incident remediation and software development. Several trends can be noted. First, GenAI is being widely used to accelerate the software development lifecycle through the use of code copilots than can generate code, refactor it, complete it, document it and analyze it for patterns, errors or vulnerabilities. GenAI can also create synthetic data to augment existing AIOps datasets or train and test new ML models. More generally, GenAI is being used to automate and optimize IT operations and application maintenance and support, for example, via self-service resolution, predictive case analytics, root-cause analysis, real-time ticket enrichment, case deflection, reduction in alert noise and security incident identification. Second, to support the increased use of GenAI-powered AIOps, most leaders are investing significantly in prompt training and associated frameworks and methodologies. Third, AIOps is shifting from a largely reactive discipline to a more proactive stance,

moving from previous rules-based, threshold approaches to ML-powered identification of emerging issues and incidents and predictive maintenance. Fourth, given the sheer variety of third-party observability and maintenance tools many IT systems use, licensing costs are becoming an important factor. Providers are, therefore, incorporating more FinOps elements into their overall frameworks for AIOps.

From the 46 companies assessed for this study, 26 qualified for this quadrant, with six being Leaders.

accenture

Accenture delivers AIOps services primarily through its myWizard® platform. It has also invested significantly in GenAI-infused solutions to enhance the software development lifecycle (SDLC).

Capgemini

Capgemini offers AIOps through several intelligent automation platforms and has invested significantly in GenAI tools and talent.

HCLTech

HCLTech offers AIOps primarily via its two platforms, DRYICE IntelliOps (for infrastructure/full-stack IT) and iONA (for applications). It has recently enjoyed a string of wins in Europe and beyond for its AIOps offerings.

TCS

TCS has a triple-layer approach to AIOps based on digital engineering, operations and business operations functionalities. It has invested significantly in GenAI infrastructure, applications and device management solutions.

tietoevry

TietoEvry offers a unified platform covering nearly every aspect of AIOps and integrations with third-party ITSM providers. It has also significantly invested in solutions to accelerate the software development lifecycle.



Wipro offers a comprehensive set of AIOps services in Europe and has a significant regional talent base. It also has extensive partnerships with ISV automation and observability providers.





“Its comprehensive array of AIOps services and significant investments in GenAI solutions make Capgemini a Leader in Artificial Intelligence for IT Operations (AIOps).”

Mark Purdy

Capgemini

Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. It offers AIOps through ADMnext and proprietary Capgemini Enterprise Automation Fabric, targeting anomaly detection, event correlation and causality determination. The company has embedded ChatOps architecture in its AIOps services. Capgemini has significant AIOps business in Europe and a substantial regional talent base.

Strengths

Comprehensive approach: Capgemini offers an array of platforms and solutions to address nearly every aspect of modern AIOps, including observability solutions, bot-enabled ticketing and servicing (for example, via Capgemini HelpDesk 2.0), IT automation and scalability (for example, via its Enterprise Automation Framework), ITSM integration, agent performance analysis and zero-touch and one-touch resolution tools.

Speedier software cycles: Capgemini has developed a palette of GenAI tools to help enterprises enhance their DevSecOps workflows, from planning to building to testing and production.

Data and AI accelerators: Capgemini has developed an extensive set of proprietary tools and frameworks to help enterprises accelerate their use of AI efficiently and responsibly. These include its AI Glass Box solution, which provides services to build, validate and fine-tune AI models, and fAIry, a framework designed to infuse ethical AI principles into ML prediction models. Its Artificial Data Amplifier enables users to convert sensitive data into anonymized synthetic data with the same probability characteristics. It can then be safely used for analysis and decision-making without compromising security or customer privacy.

Caution

Capgemini’s AIOps offerings and solutions are diffused across several automation platforms and services, which may confuse new customers. Capgemini should consider consolidating some of its AIOps solutions under a single or more memorable marketing banner.





Next-Gen Automation

Who Should Read This Section

This report is relevant to Europe-based enterprises for evaluating next-gen automation providers. Enterprises can use ISG's report findings to understand the market positioning of next-gen automation solution providers in Europe and how they meet the current and future automation needs and challenges of enterprises.

Next-gen automation represents a sustainable approach, incorporating design thinking and emerging technologies to create future-ready solutions. Providers center their automation offerings around replicating human-like cognitive abilities in machines, equipping them to comprehend, interpret and react to complex information. However, European enterprises face critical challenges such as a scarcity of skilled talent, ineffective usage of product licenses, limited applicable use cases, budget constraints and a fragmented technology stack, deeming the procured data from the stack unfit for analysis.

Thus, the mitigation strategies by providers include resource certifications, retraining programs, skill development and partnerships with hyperscalers and educational institutes to develop advanced automation technologies. The emergence of GenAI for content personalization resonating with enterprise requirements drives organizational change management (OCM) initiatives.

Providers have ramped up their research and development efforts by establishing GenAI and advanced AI CoEs and innovation centers for developing ready-to-implement blueprints that can be quickly deployed, resulting in rapid time to market. An increased focus on sustainable green solutions enables enterprises to utilize environmental, social and governance (ESG) practices to facilitate their digital transformations.



Strategy professionals should read this report to understand the relative positioning and capabilities of technology vendors delivering solutions related to the different aspects of next-gen automation.



Technology professionals should read this report to understand and compare how next-gen automation providers mitigate challenges for end-to-end automation on road maps, partnerships and solutions.



Digital professionals should read this report to infer how vendors in the next-gen automation space use the best practices for sustainable digital transformation and their comparison.





This quadrant assesses providers of **next-gen automation services, solutions and related assets**. Providers emphasize **change management** capabilities as enterprises move to the next phase of hyperautomation.

Mark Purdy



Next-Gen Automation

Definition

The Next-Gen Automation quadrant assesses providers' approaches to building a sustainable automation road map, covering innovation, organizational adoption of automation and bot development using the latest technologies and frameworks. It also encompasses using low-code/no-code (LCNC) development platforms, tools and software. This quadrant concentrates on the human aspect in terms of emerging skills to enhance the benefits of automation, thus safeguarding resource interest. This quadrant also evaluates the service providers' ability to augment organizational change management, education and technology upgrades in sync with the new releases on platforms. Next-gen automation readiness, which is a pathway to a sustainable automation strategy, includes technology, social and business objectives to build a sustainable operating model. Providers should have a design thinking approach toward automation solution provisioning to establish a structured path for innovation. They should

also have platform certifications, functional knowledge, industry expertise and a clear road map and strategy for resource upskilling and cross-skilling via partner training programs. As GenAI, in the form of text, image and code generation, continues to evolve with emerging new use cases, providers should also have a strong viewpoint and/or emerging offerings around GenAI.

Eligibility Criteria

- 1. Organizational change management frameworks:** A seamless transition across users and stakeholders ensures that external (clients) and internal (employees) entities are well managed and educated on the automation activity
- 2. Demonstrate ability to innovate through various frameworks:** Ability to build future-ready solutions, leveraging the latest technologies
- 3. Implementation and integration capabilities:** Ability to drive these capabilities using the latest, innovative technologies
- 4. Frameworks, methodologies and reference architecture:** Uses these to develop bots DevOps, CI/CD and LCNC
- 5. Generative AI:** Ability to design and incorporate generative AI solutions across portfolios, including business and technology domains. Generative AI includes text and image generation capabilities
- 6. Showcase generative AI strategy and partnerships:** Must highlight the current strategy to use generative AI and emphasize any partnerships with hyperscalers or ISVs, any R&D investment already made and a road map for future applications and development
- 7. Security tools:** Ability to use frameworks and practices that ensure both security and governance, risk and compliance (GRC)



Next-Gen Automation

Observations

While next-gen automation is still largely an emergent field for most intelligent automation providers, ISG notes a growing sophistication and degree of structure in the portfolios offered by the leading providers, prompted in large part by the increased business interest in GenAI. Next-gen automation is taking on new significance as many enterprises realize that hyperautomation initiatives require complementary changes in areas such as organizational change management, experience design and data estate modernization, and expertise in emerging technologies and frameworks for use case development. Most of the leading providers have already significantly ramped up their capabilities in organizational change management, with an array of different methodologies in evidence. Experience design is also gaining in importance, as both providers and enterprises realize that intelligent automation is not just a productivity play but, done correctly, can be critical in driving better consumer, employee and user experiences. With next-gen automation's

growing importance, providers seek to augment their knowledge and skills through research with leading universities. They are also making select acquisitions of specialist firms, with, for example, particular skills in change management, coaching or experience design. From the 46 companies assessed for this study, 26 qualified for this quadrant, with five being Leaders and one Rising Star.

accenture

Accenture is a seasoned practitioner of change management approaches in business strategy, workforce and technology areas. It is also set to invest \$3 billion in GenAI solutions, assets and talent expansion over the next three years.

Capgemini

Capgemini has announced a €2 million investment in GenAI capabilities. It has also made a series of acquisitions, including 23red, a U.K.-based design agency, and Quantmetry, a Paris-based AI consulting and solutions company.

cognizant

Cognizant offers an array of consulting and advisory capabilities around next-gen automation, with particular strengths in change management, the future of work and business process consulting.

EVIDEN an atos business

Eviden (an Atos company) has over two decades of experience in implementing change management programs related to automation and new technologies. It has demonstrated expertise in using automation for digital twin creation and usage.

tietoevry

Tietoevry brings significant change management capabilities to its next-gen automation offering. It is also working with various universities and research institutions on projects to advance innovation in intelligent automation.



Wipro (Rising Star) strongly focuses on its change management and design experience capabilities as part of its next-gen automation efforts. It can draw on expertise from several acquisitions in the digital design space.





“Capgemini is a Leader in Next-Gen Automation, with its strong capabilities and assets in experience design, change management and GenAI.”

Mark Purdy

Capgemini

Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 342,700 employees worldwide. In FY22 the company generated €22.0 billion in revenue, with Applications and Technology as its largest segment. The company provides next-gen consultancy skills through Capgemini Invent, Capgemini Academy advisory and training services, and organizational change management services. In Europe, it has a large market for its IEA services and a robust team of experts.

Strengths

Design expertise: Capgemini can bring significant expertise in total experience to its next-gen automation offerings under the Capgemini Invent umbrella. Its experience design capabilities have been augmented significantly by its acquisitions of design agencies frog (in 2019) and Fahrenheit 212 (in 2016). In November 2022, it acquired 23red, a U.K.-based design agency focused on driving behavioral change in the public and nonprofit sectors.

Change management: Capgemini’s Organization Change Management for Intelligent Process Automation (OCM for IPA) offers a methodology carefully calibrated to the needs of enterprises undergoing significant automation, based on three pillars of right setup, value-based delivery and

realization of ROI. Capgemini can draw on an extensive global talent base of OCM and automation specialists, including from its frog and Fahrenheit 212 subsidiaries.

GenAI: In August 2023, Capgemini announced a €2 million investment in GenAI, focusing on GenAI strategy offerings and use cases for CX, software development, business operations and intelligent process automation. In May 2023, it announced the creation of a GenAI CoE with Google Cloud. In October 2022, Capgemini acquired Quantmetry, an AI consulting and solutions company based in Paris, France.

Caution

Capgemini must sustain the momentum of its GenAI investments as competition grows. Leveraging its design expertise, Capgemini should demonstrate more thought leadership on experience design’s role in maximizing GenAI’s business impact.





Appendix

The ISG Provider Lens 2023 – Intelligent Automation – Services and Solutions study analyzes the relevant service providers in the Europe 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 November 2023, 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.

The study was divided into the following steps:

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



Author & Editor Biographies



Lead Author

Mark Purdy
Principal Analyst

Mark Purdy is a Principal Analyst at ISG Provider Lens™ and brings more than 28 years of experience working on economics and technology research in business and government. Mark has a particular focus on next-generation technologies, especially artificial intelligence and intelligent automation, digital twins, digital olfaction, machine learning, virtual reality and edge computing. For ISG, Mark has led studies on intelligent automation, cloud-native technologies, the Microsoft ecosystem, and the Google ecosystem. Before joining ISG, Mark was chief economist at a major consulting firm for 20 years, leading work on the economic impact of AI and business futures, amongst other topics.

His recent independent research and thought leadership work has focused on topics such as the rise of the “prompt economy” (generative AI), the use of generative AI for decision-making, sound-based machine learning, customer experience in the metaverse, the future of work in the metaverse, better ESG data for decision makers, contactless commerce, AI-powered machine discovery, digital twins, digital trade, the rise of techno-nationalism, the economics of supercomputing, and issues of bias and quality in AI systems. He has published widely in tier-1 media and business publications such as Harvard Business Review and Sloan Management Review.



Enterprise Context and Global Overview

Mukesh Ranjan
Research Specialist

Mukesh has around seven years of experience in the market and industry research. He currently serves as a research specialist with a key interest in emerging technologies. In his current role, he is responsible for supporting and co-authoring Provider Lens™ studies on intelligent automation, IoT, and others. His areas of expertise are automation, Internet of Things (IoT), procurement and emerging technologies. He is also involved in authoring enterprise context and the global summary report with market trends and insights.

Mukesh has been part of several custom research engagements in areas of automation, competitive intelligence and others. In his earlier roles, he was primarily conducting secondary and primary research on competitive benchmarking, SWOT analysis, industry assessment, vendor briefing decks, among others.





Enterprise Context and Global Overview

Sameen Mohammed Siddique
Research Analyst

Sameen is a research analyst with ISG, with a key interest in the market and industry research across emerging technologies. She supports and co-authors Provider Lens™ studies on intelligent automation, mainframes, Google Cloud Platform (GCP) ecosystem and others. She is also involved in authoring enterprise context and global summary reports with market trends and insights. Her areas of expertise are automation, telecommunication, and retail.

Sameen has been a part of diverse market, business, and consumer research teams, effectively transforming market data into actionable insights and intelligence reports for several leading companies. In her prior roles, she has worked on qualitative and quantitative research, market feasibility studies, SWOT assessment, and competitive analysis.



IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

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.



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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Founded in 2006, and based in Stamford, Conn., ISG employs more than 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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