

# IDC MarketScape: Worldwide Intelligent Automation Services 2022 Vendor Assessment

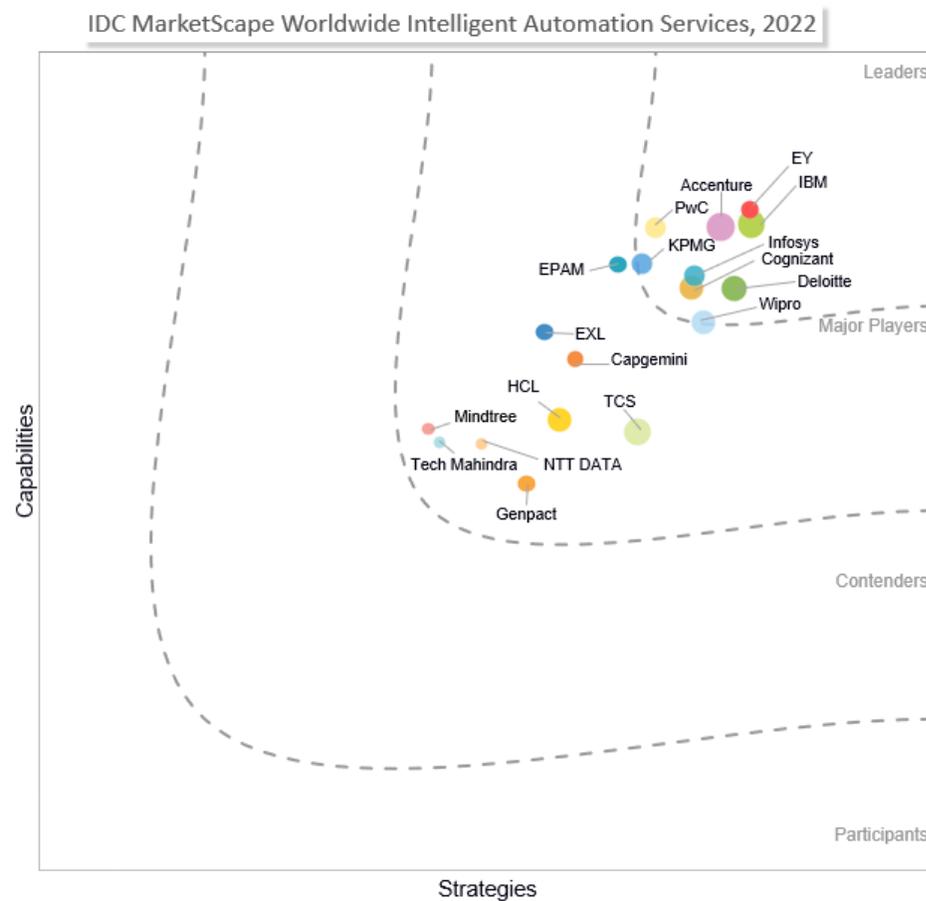
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THIS IDC MARKETSCAPE EXCERPT FEATURES IBM

## IDC MARKETSCAPE FIGURE

FIGURE 1

### IDC MarketScape Worldwide Intelligent Automation Services Vendor Assessment



Source: IDC, 2022

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

## IN THIS EXCERPT

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The content for this excerpt was taken directly from IDC MarketScape: Worldwide Intelligent Automation Services 2022 Vendor Assessment (Doc # US48061422). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1,2 and 3.

## IDC OPINION

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This IDC study represents a vendor assessment of the 2022 intelligent automation (IA) services market through the IDC MarketScape model. IDC first assessed this market in 2019. In the intervening two-and-a-half years, IDC research has shown continued expansion of the realm of intelligent automation as enterprises look to connect information systems and process automation to improve overall enterprise intelligence. Specifically, we have observed organizations investing in solutions to automate knowledge work and decision environments using a breadth of technologies beyond robotic process automation (RPA), including artificial intelligence (AI), optical character recognition (OCR), business process modeling (BPM), process and task mining, application programming interface (API) integration and management, event-driven monitoring, low-code development platforms, cloud, and enterprise applications.

Intelligent automation solutions have shown great potential for not only reducing costs but improving outcomes for buyers in areas such as operational efficiency, employee productivity, resiliency, customer satisfaction, nonlinear revenue growth, and business model innovation. However, buyers also face challenges in adopting intelligent automation solutions, such as data quality and management issues, lack of support and maintenance resources, insufficient skills or willingness on the part of employees to use intelligent automation technologies, and unclear use cases or business benefits. Services providers play a key role in supplying technical skills and expertise in strategy, architecture, process optimization, and change management to help buyers navigate these challenges and ensure intelligent automation solutions deliver business value and ROI.

In this assessment, IDC evaluated intelligent automation services vendors across 52 scored criteria and collected feedback from 79 customers on their perception of the key characteristics and the capabilities of these vendors. Key findings include:

- The most critical vendor attribute for successful intelligent automation services, according to IDC's *Intelligent Automation Services Buyer Perception Survey*, was "ability to achieve business outcomes." Despite many updates IDC made to the evaluation criteria and buyer perception survey instrument to refine its assessment of intelligent automation services vendors and reflect market evolution, the perceived priority of this attribute over all others did not change from the 2019 study.
- When buyers were asked what the primary business objective driving their engagement of their intelligent automation services vendor, at a worldwide level, the most frequent responses were "improve operational efficiency," "improve employee efficiency and productivity," "reduce costs," "increase work output without the need to hire more employees," and "build capability for tomorrow's business." Nearly half (47.9%) of the buyers said they achieved 25% or greater improvement in measurable KPIs from their intelligent automation services engagement.

- The top-rated vendor attribute, in aggregate, was "ability to provide solutions using our preferred intelligent automation technology providers." This aligns with IDC's evaluation of the breadth of technology alliances as the top area of strength across all intelligent automation services vendors.

## IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

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This research includes analysis of 18 intelligent automation services providers with broad portfolios spanning IDC's research coverage and with global scale. This assessment is designed to evaluate the characteristics of each firm – as opposed to its size or the breadth of its services. In determining the group of vendors for analysis in this IDC MarketScape, IDC considered the following set of inclusion criteria:

- Worldwide intelligent automation services revenue of at least \$100 million over the last calendar year, with revenue generated in each major geographic region (i.e., Americas, EMEA, and Asia/Pacific)
- Worldwide intelligent automation services practice size of at least 1,000 resources, with geographic delivery capabilities across the Americas, EMEA, and Asia/Pacific regions
- Offerings spanning the full life cycle of intelligent automation services (i.e., project based, managed services, support, and training)
- Go-to-market alliances with at least three robotic process automation software providers

## ADVICE FOR TECHNOLOGY BUYERS

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- **Maturity assessment.** Wherever your organization is on its intelligent automation journey, there are benefits in working with a professional services partner. However, the appropriate role and attributes of that partner (or set of partners) will depend on what your needs are. Consider vendors that take the time to understand your organization's intelligent automation maturity and offer capabilities and solutions that both fit your current situation and will take you where you want to go. If you have tried and struggled to launch an automation program in the past, choose a vendor with specific expertise in remediating automation "false starts."
- **Services life cycle.** IDC research shows that buyers need support across the intelligent automation services life cycle, from discovering use cases to deploying, supporting, and maintaining intelligent automation systems to training end users. Consider vendors that can partner with you in what will be an ongoing process of building new automations, transitioning those to management and support modes, and then finding new automation opportunities with which to repeat the cycle.
- **Data and intelligence.** Automation at any level depends on access to high-quality data to execute functions. Siloed systems, manual workarounds, and overly complex workflows can cause data errors requiring human intervention, which can negate the efficiency benefits of automation, and worse, waste opportunities for business observability and enterprise intelligence. The negative impact of poor data quality intensifies as the scope of automation increases from tasks to activities to processes and as decision-making power shifts from humans toward machines. Moreover, governance and security risks increase as pockets of innovation and automation activity by nonprofessional developers arise across the organization. Select a vendor that addresses data quality, management, governance, and security in its intelligent automation services offerings.

- **Center of excellence (COE).** As automation programs grow, a centralized approach to aligning expertise, resources, and governance for intelligent automation initiatives can provide efficient and cost-effective deployment and management while encouraging innovation across the organization. Whether you already have an automation center of excellence in place or need assistance to establish one, choose a partner that can augment your internal capabilities with best practices, frameworks, tools, platforms, skills, and training resources. Keep in mind that most services vendors have gone through their own intelligent automation journeys and in the process have learned lessons and developed innovative IP that could benefit your organization's program.
- **Insights and innovation.** A common feedback theme across the buyer interviews and surveys IDC conducted for this study was some variation of "we wish our vendor would provide us more insight into what else we could be doing with intelligent automation." If this resonates with your experience, push vendors to provide proactive recommendations and suggestions to improve your automation program and deliver better business outcomes. Consider vendors that demonstrate these capabilities through thought leadership around intelligent automation use cases and technology advancements, industry- or function-specific transformation road maps and solution catalogs, and data-driven discovery methodologies.
- **Stakeholder alignment.** According to IDC's *Intelligent Automation Services Buyer Perception Survey*, the most common project sponsors for intelligent automation services engagements were CIOs/CTOs, information technology (IT) directors and managers, and line-of-business heads. However, buyers also rated "engagement of our employees in automating tasks and processes" as one of the top 10 most critical attributes for intelligent automation services' success. Choose a vendor that not only knows how to communicate with budget holders but also can engage effectively with end users, who will be interacting with and supporting intelligent automation solutions, through workshops and change management programs.
- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short list vendors for intelligent automation services bids but also evaluate vendors' proposals and oral presentations. Make sure you understand where these players are truly differentiated and take advantage of their expertise, technical, industry base, or otherwise.

## VENDOR SUMMARY PROFILES

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This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

### IBM

According to IDC analysis and buyer perception, IBM is positioned in the Leaders category in this 2022 IDC MarketScape for worldwide intelligent automation services.

IBM defines "extreme automation" as "the delivery of digitally transformed, technology-driven IT and business processes and operations that are pervasive across an organization and are adaptive end to end, underpinned by exponential technologies and powered by a hybrid workforce." IBM's Extreme Automation offerings span the life cycle of intelligent automation services, including Automation Advisory and Process Excellence, Business Automation (Automation First BPO, Automation @ Scale, and Automation for Enterprise Transformation), and Technology Automation (IT Digital Operations, Ansible @ Scale, and IT Intelligent Workflows). Underpinning IBM's intelligent automation services is the company's Extreme Automation Platform, which brings together AI, automation, and analytics

technologies from IBM and its partner ecosystem and provides access to consumable assets including the digital workforce deployed with and supported by Agile and Lean methods, as well as IBM Content Intelligence Engine. IBM's global experts leverage its IBM Garage Method for Automation to cocreate, co-execute, and cooperate intelligent automation solutions with clients, applying frameworks such as IBM Process Excellence (PEX) Methodology to drive business impact across customer, finance and supply chain, HR, and IT transformation.

## **Strengths**

Buyers rated IBM highly for its ability to achieve desired business outcomes, optimize the ratio of onshore and offshore efforts on an engagement, integrate IBM's team with their internal team, offer flexible pricing models, and communicate the value of the services, solutions, methodologies, and tools they are currently consuming. IDC considers IBM's end-to-end life cycle of intelligent automation services portfolio, breadth of technology alliances, and strategies around platforms, infusing enterprise intelligence in delivery, workshops and stakeholder alignment, sales and distribution, innovation and R&D (both internal and external), and employee skills as key strengths.

## **Challenges**

IDC believes IBM's client adoption strategy, though strong overall, could be improved further by a broader range of methods to engage clients' employees to take part in intelligent automation initiatives. IBM could also benefit from more collaboration with a broader spectrum of partners, such as training and upskilling platforms, crowdsourcing providers, and industry-specific solution partners, on go-to-market initiatives for intelligent automation services.

## **APPENDIX**

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### **Reading an IDC MarketScape Graph**

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

### **IDC MarketScape Methodology**

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user

interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

## Market Definition

Intelligent automation services are used to assess, plan, design, implement, and operate software tools and platforms that do the following:

- **System-centric automation:** Connect and orchestrate custom and packaged applications to support automated processing.
- **Labor-centric automation:** Replace and augment manual tasks as well as automate the coordination of human-centered process work.
- **Decision-centric automation:** Automate decision making and provide predictive and prescriptive analytics.
- **Automation planning:** Provide process discovery and support design and analysis of automation applications and systems.

Detailed definitions of the software tools and platforms that are relevant for intelligent automation services engagements are available in *IDC's Worldwide Software Taxonomy, 2022* (IDC #US48990921, April 2022). Further, IDC has observed increasing convergence of AI and automation across these segments.

This IDC MarketScape covers a variety of vendors participating in the worldwide intelligent automation services market. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing intelligent automation services in both the short term and the long term.

Services providers engage with clients to build the intelligent automation capabilities outlined previously through advisory services, IT project-based services, managed and optimization services, and automation centers of excellence (see Figure 2). For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2021* (IDC #US47191221, May 2021).

FIGURE 2

## Intelligent Automation Services



**Automation advisory services:** Strategic assessment, ideation, design thinking, business process assessment, business case development, program management, and change management



**IT project-based services:** Planning, designing, building, and implementing intelligent automation solutions



**IT managed and optimization services:** Management of technology implemented for intelligent automation solution and management of bots



**Business managed and optimization services:** Management of intelligent automation-enabled business process as a service and KPI measurement



**IT training or support:** Enablement of internal IT resources to run day-to-day operations of intelligent automation solutions



**End-user training:** Skills development and enablement of nontechnical businesspeople to use intelligent automation within job role

Source: IDC, 2022

### *Customer Perceptions of Intelligent Automation Services Vendors*

A significant and unique component of this evaluation is the inclusion of the perceptions of intelligent automation services buyers of both the key characteristics and the capabilities of the vendors evaluated. The buyers participating in IDC's *Intelligent Automation Services Buyer Perception Survey* have partnered with at least one of the participating vendors directly on an intelligent automation services engagement within their company. Buyers were surveyed across all three of IDC's macroregions. The survey findings highlight key areas where buyers expect intelligent automation services providers to showcase a range of capabilities. The buyers consider these capabilities a must-have for intelligent automation services to be able to fulfill the requirements of many business and IT issues that challenge the buyers.

Figure 3 illustrates the order of factors important for a successful intelligent automation services engagement for the intelligent automation services customers surveyed in 2022. Survey findings suggest that the ability to achieve desired business outcomes by the consulting and delivery teams working on an intelligent automation services engagement is the most critical factor for the successful completion of the engagement. Customers also indicated a vendor's quality of skills in and knowledge of intelligent automation, ability to deliver value for fee paid, provide technical insights and competency, and provide proven methodologies and tools for solving their issues to be among the most critical attributes for an engagement's success.

**FIGURE 3**

**Top 10 Factors for Successful Intelligent Automation Services Engagements, 2022**

Q. *In order for an intelligent automation services engagement to be successful, please indicate the importance of each of the following characteristics.*



n = 74

Note: Mean scores are based on a scale of 1-5, where 1 is highly detrimental to success and 5 is essential to success.

Source: IDC's *Intelligent Automation Services Buyer Perception Survey*, 2022

## LEARN MORE

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### Related Research

- *IDC FutureScape: Worldwide Artificial Intelligence and Automation 2022 Predictions* (IDC #US48298421, October 2021)
- *Intelligent Automation Services Survey, 2021* (IDC #US47133621, September 2021)
- *Market Analysis Perspective: Worldwide Analytics and Intelligence Automation Services, 2021* (IDC #US47133121, September 2021)
- *IDC's Worldwide Services Taxonomy, 2021* (IDC #US47191221, May 2021)
- *IDC MarketScape: Worldwide Intelligent Automation Services 2019 Vendor Assessment* (IDC #US44934619, September 2019)

### Synopsis

This IDC study represents a vendor assessment of the 2022 intelligent automation services market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the intelligent automation services market. This IDC MarketScape covers a variety of vendors participating in the intelligent automation services space. The evaluation is based on a comprehensive and rigorous framework that assesses vendors relative to the criteria and to one another and highlights the factors expected to be the most influential for success in the market in both the short term and the long term.

"As intelligent automation increasingly becomes an integral component of digital business and future enterprise strategies, services providers have evolved their portfolios and expanded their capabilities to meet a broader range of buyer needs across technology, data, people, and processes," says Jennifer Hamel, research manager, Analytics and Intelligent Automation Services at IDC. "Successful vendors both have forward-looking strategies for supporting clients' intelligent automation adoption needs and demonstrate current capabilities and proof points through existing client engagements."

## About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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