



# THE 2016 RPA PREMIER LEAGUE TABLE—TRANSFORMATION COMES TO THE FORE

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HfS' [inaugural Intelligent Automation Blueprint](#) has outlined the state of the nation in Intelligent Automation and drawn very distinctive lines into the sand. We are seeing the exponential growth of the deployments setting in. However, this growth occurs largely below the radar as the market communication and stakeholder management around the notion of automation remain unusually coy. This is largely due to the not yet fully understood impact on revenue models on the supply side but also to emotional responses to notions of robotics and Artificial Intelligence (AI). Yet, the notion of what RPA is meant to represent is starting to shift in line with that maturation. It is moving beyond the extraction of data from heterogenous systems and the ability to capture, schedule and execute process steps in a studio, drag and drop style. All tool providers are expanding the capabilities toward operational analytics and AI while service providers are pushing service orchestration and broad automation frameworks. As a result, the go-to-market and the stakeholder management is evolving from notions of task automation and a narrow, short-term cost focus toward an emphasis on transformation and end-to-processes. Unsurprisingly, this has led to significant shifts in the competitive landscape.

Thus, building on and following up on the discussions for the Blueprint, HfS is assessing the competitive landscape of service providers in two categories: Transformation Enablers and Automation Pure Plays. We are aiming to assess which service providers has moved up the value chain and are pursuing a holistic approach to service delivery and automation by demonstrating transformational capabilities. In both categories, we are focusing on implementations, not just broader advisory services or tool selection projects. The goal of this assessment is to provide a deep dive and more nuanced analysis of the specifics of the RPA segment. While the Intelligent Automation Blueprint has outlined the way in which service delivery at large is being innovated and disrupted by automation, the Premier League Table is analyzing details of RPA centric strategies and deployments.



## Taking Stock of RPA

Automation is in the eye of the beholder, and RPA is no exception to that. While nothing is defined in the context of Intelligent Automation in general—and RPA in particular—the capabilities of leading technology providers Blue Prism, UiPath and AutomationAnywhere offer a broad steer as to how to look at RPA market. Without claiming that HfS's definition of RPA is adopted across the industry, we content that RPA describes a software development toolkit that allows non-engineers to quickly create software robots to automate rules-driven business processes. For example, digitizing the process of collecting of unpaid invoices, which involves mimicking manual activities in the RPA software, the integration of electronic documents, and the generation of automated emails to ensure the whole collections. The process is run digitally and can be repeated in a high-throughput, high-intensity model. A cross- industry working group led by Lee Coulter and AJ Hanna from Ascension Health is doing an outstanding job of providing a taxonomy for the disparate concepts and technologies that tend to get discussed in the context of Intelligent Automation. By working under the umbrella of the IEEE standard-making organization, the working group is working toward moving closer to achieving industry-wide acknowledged standards. However, it will take significant time to get closer to a clearer understanding of Intelligent Automation and RPA across the broader industry.

Yet, the capabilities of RPA tool sets are evolving strongly from its origins in business process centric scenarios, often in the context of shared services strategies. HfS sees a convergence with more IT-centric scenarios as RPA tools are being used for password reset in IT help desk use cases and moving forward we see increasingly deployments in application management along with other Intelligent Automation technologies. At the same time, the leading tool providers have fundamentally shifted from the early positioning of RPA as a turn-key solution with a focus on FTE replacement to emphasizing the management of virtual workforces. Thus, reiterating the shift toward more transformational RPA implementations. Similarly, the capabilities of the leading tool providers are expanding from the core features that we have described to integrating operational analytics and broad cognitive capabilities. For example, UiPath is working on integrating OpenSource AI tools and libraries from the likes of Google, Microsoft, and Facebook while advancing toward industry-specific templates and solutions. While AutomationAnywhere is driving scalability and consumption-based pricing through its BotFarm concept. Bots and artifact libraries can be scaled up and down on demand. Some of the pure plays are using consumption-based pricing to disrupt the established providers by piloting bots by the minute offerings. Suffice it to say the danger of commoditization looms large over these pilots. But all these initiatives are demonstrating the strong acceleration of the market. And beyond the usual suspects, we have NICE and Pega Robotics (OpenSpan) evolving from more front-office centric scenarios while Jidoka has found a niche in Spanish speaking markets.

The biggest shift in the market, however, is toward understanding and approaching RPA implementations as transformational projects. This manifests itself in two ways. First, on the supply side, all leading providers have built out automation platforms that are underpinned by service orchestration and automation frameworks. Thus, moving away from simplistic views of approaching RPA with a tool centric approach. Rather, these platforms evolve toward notions of plug-and-play where automation tools can be adapted to use cases. Crucially, these tools are not confined to RPA capabilities but span the complete [Continuum of Intelligent Automation](#), including cognitive, AI as well as self-learning and self-remediating engines. Second, the go-to-market is shifting toward more consultative approaches



looking at the integration of Intelligent Automation into service delivery backbones. A good example for this is Symphony Ventures' SAVO methodology:

- » **Simplify:** Redesign and standardize processes to remove waste, improve effectiveness, and increase customer and employee satisfaction.
- » **Automate:** Utilize the most advanced RPA and AI tools to minimize manual work and free your best resources to focus on higher interest and higher value tasks.
- » **Virtualize:** Optimize tasks requiring human input and judgment-based operations, and create scalable on-demand access to a capable and flexible workforce.
- » **Orchestrate:** Coordinate the entire process with complete end-to-end visibility, and refine and drive improvements with the support of real-time analytics and managed services.

Invariably with this shift the Big 4, but also Alsbridge and pure-plays like Symphony, VirtualOperations, GenFour and thoughtonomy are coming to the fore. However, with the notable exception of Symphony none is offering broader BPO Services but rather lead transformational projects. Yet, this is a crucial distinction from the broader advisory and tool selection work that many of the sourcing advisors do.

Another way of looking at this is differentiating tactical versus strategic projects. As part of tactical projects, RPA can automate low hanging fruits in the process chain. But what we have seen in plenty projects is that those tactical projects have been done without coordination with the process owner thus running the danger of comprising the overall quality of processes. Suffice it to say the pressure to cut cost is not going away, however, there is a danger of seeing RPA like a drug to counter those pressures. Rather the more holistic and strategic the approach, the greater the potential for cost and efficiency savings. The big constraint in progressing toward transformational projects is the scarcity of talent that has the technical knowledge to understand the implications of RPA on the process flows. Fundamentally, we see a bifurcated market. On the one hand, cost focus/task automation/short-termism, on the other hand increasingly transformation/end-to-end/holistic automation approach.

Moving toward transformational projects is intrinsically linked with scaling RPA deployments. The talent that can understand the implications on and dependencies from legacy software and UIs are scarce. One executive poignantly quipped, *You don't put a Fiat engine into a Ferrari*. It is around those issues that the pure plays and management consultancies are coming to the fore. It is here where the rubber hits the road. Many of the system integrators have built out impressive automation capabilities, but are only selling automation reactively and often on task automation level. For many, it still makes more commercial sense to sell labor arbitrage than automation.

## Understanding the Methodology Behind the RPA Premier League Table

The RPA Premier League Table is building on and following up on the discussions for the HfS Intelligent Automation Blueprint. Thus, RPA should be seen as a subset of the broader service delivery capabilities of the service providers. While not aiming to define RPA, technologies such as Blue Prism, UiPath, and AutomationAnywhere as well as proprietary tools sets with comparable capabilities were used as reference points for RPA. Suffice it to say, RPA capabilities have been expanded to front office activities by providers such as NICE and OpenSpan. Equally, at times



RPA is just being used as a placeholder for the broader notion of Intelligent Automation. The input for the Blueprint was enhanced by additional material and discussions with the respective service providers. Additionally, we had discussions with Blue Prism, UiPath and AutomationAnywhere to get a steer on their partner eco-systems.

Based on these inputs we have evaluated the services providers against the following criteria:

- » Vision and credibility of RPA strategy
- » Driving value through end-to-end process view as opposed to short term cost cutting
- » Breadth and maturity of internal tools and external partnerships for RPA
- » Scale of deployments
- » Integration of RPA in delivery strategy
- » Commercial traction
- » Effectiveness of marketing effort behind RPA strategy
- » Effectiveness in training clients (pure plays only)

## The 2016 RPA Premier League Table

The 2016 RPA Premier League is a reflection of the increasing maturity of the market. The usual suspects among the global system integrators are dominating. However, the biggest shift is the rise of Big 4 and organizations like Alsbridge that underline the shift toward transformational projects. The significant changes in comparison to the 2015 ranking can be explained by the fact that we have applied a stronger weighting on commercial traction as well as the scale of deployments. In 2015, given the early market development phase, the emphasis had been more on strategic considerations as well as the effectiveness of the marketing messages.



Table 1: Transformation Enablers

2015	2016	Service Provider	Comments
6	1	Accenture	Driving a holistic strategy for Intelligent Automation with strong innovation; impressive reference point is Accenture Robotics Solution with operational analytics and virtual agent capabilities
n/a	2	Deloitte	Early move in RPA and pushing RPA eco-system approach as part of transformation strategy; effectively leveraging Deloitte Consulting's broader Cognitive Automation capabilities; broad traction across verticals with a focus on selected countries.
8	3	Cognizant	Holistic automation strategy and strong thought-leadership; Emerging Business Accelerator acts as effective incubator; strong traction in healthcare around the HPA platform
n/a	4	EY	Committed focus on RPA as focal point of its Smart Automation strategy; emphasis on transformation and differentiation through global roll-outs; blending broader digital IP into RPA solutions
2	5	TCS	Evolving toward holistic automation strategy leveraging assets including ignio; moving to a hybrid tool set approach in RPA. Appetite to cannibalize revenues to further solution capability.
5	6	Genpact	Pioneer and early thought-leader on RPA; holistic approach around Lean Digital concept; positioned "Rapid Automation" as a broad set of tools and approaches that enhance systems of engagement. Rather than emphasizing task automation and individual tools, Genpact consistently positions IA as a transformational approach
3	7	IBM	Commitment to AI and a holistic approach to automation, with strong focus on Blue Prism in RPA; moving forward evolving toward portfolio approach leveraging its Golden Bridge Solution; extending RPA to application management scenarios
n/a	8	Atos	Focusing on industrialization of service delivery; Atos Hybrid RPAaaS Cloud Platform offers clients a scalability; driving RPA into broader application management scenarios
12	9	Capgemini	Evolving toward holistic automation strategy with Automation Drive Suite; early proponent of integration of unstructured data with Celaton partnership; advancing towards integration of unstructured data on an industrial scale (industrialization of virtual delivery centers). Existing clients complain about an unwillingness to share risks/gains with RPA initiatives.
1	10	HPE	Holistic automation approach with a focus on large complex deals; integration with CSC resulted in a lack of stakeholder engagement; merger will provide a much more holistic approach to RPA with greater emphasis on data curation. Strong initial focus has been sidetracked with CSC merger.
9	11	Wipro	Refocusing its automation assets under the HOLMES brand and platform; RPA being integrated into Base platform; consultative approach to BPO and RPA with Enterprise Operations Framework
n/a	12	KPMG	Strong internal leverage and advisory capabilities; accelerating implementations with portfolio approach and a broad set of process accelerators. Early market mover, with greater emphasis on AI in finance processes
10	13	Infosys	Broad capabilities under the EdgeVerve umbrella; RPA capabilities will be increasingly integrated with analytics assets of MANA platform. AssistEdge has potential, but needs focus and proven client pilots
n/a	14	Alsbridge (ISG)	Build-out of RPA practice crucial component for acquisition by ISG; strong emphasis on AutomationAnywhere partnership; likely to be a catalyst for more investments at ISG. Current focus more on software selection that transformation, however, ISG will open doors to CIOs, particularly in North America



n/a	15	TechMahindra	Accelerating automation build-out with hybrid tool strategy; UNO-R (proprietary) and UNO-P (third party tools including Blue Prism and UiPath); advancing toward cognitive scenarios integrating unstructured data leveraging TACTI Xplatform
n/a	16	Syntel	Pioneer of holistic automation platform with SyntBots; broad set of marquee clients; evolving toward enterprise-grade governance with Virtual Workforce Manager; driving RPA tool sets into application management. Stronger in IT automation than business process. Recent departure of CEO Nitin
n/a	17	PwC	Late starter, but now scaling out Intelligent Process Automation capabilities; emphasizing transformation by treating all RPA deployments as bespoke engagements; moving toward notions of OneOffice
7	18	Xerox	Pushing proprietary tool set around the Xerox Automation Suite; expanding toward holistic notion including Machine Learning and voice assistants. Strategy with new CEO Ashok Vemuri still uncertain
(13)	19	CSC	Leveraging predominantly Xchanging's RPA program, but expanding to a more holistic, data-centric approach focused on operational data mining. Strategy with new HP merger still undefined.
16	20	EXL	Late mover, but showing commitment to RPA from leadership. Differentiation through analytics; pushing domain-specific embedded analytics to transform real-time operational decision-making and management into advance customer relationships to more outcome-based models; challenger positioning by embracing the notion of revenue cannibalization with a view of gaining more work from clients. Impressive number of engagements with Automation Anywhere, but needs to build traction with other solution providers
14	21	HCL	Accelerated build out of DryICE Automation Framework offers an opportunity to rejuvenate the RPA strategy around ToscanaBot; portfolio approach on RPA tool sets; increasingly expanded to IT-centric orchestration with its iAutomate solution. New CEO CVK emphasizing strong focus on automation, now needs to execute
11	22	Dell	Solid traction in healthcare with AFTE solution; integration into NTT DATA led to de-emphasizing stakeholder management. Waiting to see future strategy unfold under NTT, which has a very strong approach in IT automation

Source: HfS Research, 2016

We have split out the automation pure-plays who exclusively focus on providing services around the notion of Intelligent Automation. Those organizations are the vanguard of deploying RPA based on their technical understanding of the RPA tool sets but crucially can apply this knowledge how these tools are impacting process flows. We have split them out because they cannot compete on scale with the system integrators, yet often have the strongest strategic and technical capabilities. Because of that, we expect that most of them will be **absorbed by the leading management consultancies** over the next 18 months. And the table does not only capture the usual suspects but underlines the increasing maturity as regionally focused providers like RPA Implementation, Mindfields, and Roboyo are starting to scale out.



Table 2: Automation Pure Plays

2015	2016	Service Provider	Comments
2	1	Symphony Ventures	Disrupting the RPA disruptors with an aggressive approach to delivering both strategy and implementation capability to clients in both BPO and shared service models. Underpinned by SAVO methodology, driving change management, governance, and education in a holistic strategy for IA; expanding offering toward Robotic BPO: Evolving from a more consultative approach, extending its offerings towards supporting human exception and expert processes, providing a shared object library; robust nearshore capabilities in Poland. Strong track record of hiring and developing RPA talent and compelling thought leadership from the likes of David Poole, Ian Barkin, David Brain and Pascal Baker.
1	2	GenFour	The first "pure play" RPA implementation house with a cognitive twist. Experienced pioneer and early thought-leader on RPA resulting in credibility of advisory services; expansion of RPA to unstructured data: one of the pioneers integrating Celaton with RPA tool sets; Effectively leverages a delivery center in Wales. Strong leadership from James Hall, one of the grandfathers of RPA
n/a	3	VirtualOperations	Pioneer of RPA, delivering at scale focused on large accounts; strong emphasis on empowering clients with IA: VO focuses to build joint agility teams with their clients by leveraging their RPA Academy; focus on process and organizational consulting. Entrepreneurial skills of Nick Andrews has seen the company continue to expand after two of the firms' founders, Matt Smith and Dan Hudson, moved to Cognizant in 2014.
n/a	4	Thoughtonomy	Strong growth momentum under CEO Terry Walby, especially in supporting global SIs; strong emphasis on platform play with Virtual Workforce Platform; strong emphasis on training clients
n/a	5	RPA Implementation	Canada-based under leadership of Terry Woods with focus on North America; focus on enterprise-wide deployment; strong traction in insurance
n/a	6	Mindfields	Regional focus on ANZ, expanding into the US and broader automation capabilities; strong emphasis on training clients. Dynamically driven by Mohit Sharma, who never seems to sleep
n/a	7	Roboyo	Regional focus on DACH region; fast growing across processes and across verticals

Source: HfS Research, 2016



## The Details

Positioning the service providers within the context of the broader notion of RPA is not simple. As discussed, many stakeholders use the term very broadly, often with connotations to what HfS calls the Continuum of Intelligent Automation. Against this background, in our view a distinct group of leaders is standing out:

- » **Accenture** is pushing the envelope on innovation while leveraging the transformational capabilities of its consulting division. Crucially, it is driving a holistic approach Intelligent Automation by defining a spectrum of technologies that span RPA, virtual agents, natural language processing, machine learning, advanced analytics and other areas of artificial intelligence. A broad set of proprietary tools is complementing the plethora of third party tools. A strong example is the Accenture Robotics Solution adding proprietary RPA capabilities to its portfolio. The solution is modular and able to integrate optional technologies for each client, for example, by using Google or Facebook APIs when needed.
- » **Deloitte** is the strongest riser in the RPA Premier League Table by pushing a holistic transformation agenda. They have strong client traction across verticals while leveraging shared services development platform out of India. The company is pursuing eco-system approach with the leading RPA vendors which are complemented by Deloitte Consulting's Cognitive Automation capabilities.
- » **Cognizant's** automation team within the Emerging Business Accelerator (EBA) is at the vanguard of educating the marketplace on the implications of automation. The company pursues a blend of proprietary and third-party tools. It has a structured approach to screen the innovation in IA. Cognizant's vendor-agnostic Smart Systems Alliance is an indicator of the firm's deep understanding of the competitive landscape. These partners are complemented by exhaustive proprietary tools, in particular, HPA in healthcare from the TriZetto acquisition as well as Automatika.

Close behind the leaders is EY and TCS. EY has embedded its RPA approach into the broader Smart Automation Framework with a strong focus on transformational projects helping clients to move toward self-service and CoEs. Conceptually, EY is moving toward the notion of the OneOffice. At the same time, EY is emphasizing its close partnership with Blue Prism. TCS' RPA has significantly matured, in particular by embracing a hybrid tool strategy and by focusing its go-to-market around nuanced use cases. Atos and Capgemini are examples for driving RPA tool sets into application management scenarios. Alsbridge stands out as one of the few sourcing advisors, and the only one with a global presence to expand its capabilities into RPA implementations. These capabilities were a key consideration for the acquisition by ISG. EXL offers differentiation by integrating RPA into analytics driven EXLerator Framework, but more importantly by adopting a challenger position. EXL is willing to take on projects where competitors were hesitant or unwilling in order to expand its installed base. In the words of its CEO EXL is willing to cannibalize its revenues in order to gain new customers.

Moving forward the interesting developments to watch will be the merger between HPE and CSC. While HPE brings large complex deals into the merger, CSC brings a mature RPA center from the Xchanging acquisition while the new delivery focus will be much more data centric with a strong emphasis on leveraging OpenSource tools. Just behind



the 22 leading RPA providers are organizations like Arvato who are starting to scale out RPA with global marquee clients or Swiss Post Solutions who have embedded RPA and AI into document management and are scaling out to higher value services. However, surprisingly front-office centric service providers remain coy of implementing RPA. HGS is the notable exception by driving RPA into healthcare-centric scenarios.

## What to Watch in 2017

The pace of change in building out Intelligent Automation capabilities is astounding. Therefore, we expect wholesale changes in 2017:

- » **M&A will disrupt the market:** Following on from the acquisitions of Alsbridge and Automic, leading tool providers as well as the leading pure plays are likely to be absorbed by acquisitions of the next 18 months. This might lead to the development of more proprietary tools— to mitigate those risks and also to allow for broader functionalities. At the same time, go-to-market strategies have to be adapted as the large management consultancies will play an increasingly dominant role as RPA deployments will pivot around transformational projects.
- » **The rise of Virtual Agents:** We will see increasing traction of virtual agents that will fundamentally **change the notion of service agents**. These deployments will push more holistic automation approaches while disrupting workforces. Thus, these agents will increasingly offer broad management capabilities such analytics and integration capabilities for code and files. Therefore, the focus will shift toward enabling a seamless customer journey underpinned by broad knowledge libraries, dynamic case management and above everything else Natural Language Processing (NLP).
- » **Data is the new currency:** The acceleration of service delivery toward notions of cognitive and AI will make data curation a central topic and challenge. Scale in having access to data will become an important differentiator.
- » **Drive commonality across organizational boundaries:** To support customers in advancing toward the As-a-Service Economy, providers will start organizing service delivery beyond the traditional organizational boundaries or stovepipes. Both to leverage commonalities as well as to enhance agility. Fundamentally, we have to move beyond attempting to retrofit innovation like automation into the old organizational models.



## Recommendations for Buyers

Leveraging the insights from the Intelligent Automation Blueprint and our ongoing discussions with stakeholders, the key recommendations of this study are:

- » **Anticipate the impact of M&A:** The leading tool providers as well as the leading pure plays are likely to be absorbed by acquisitions of the next 18 months. Therefore, the business case should be based on potentially higher licensing costs as well as consulting fees.
- » **Seek advice on end-to-end process implications:** It is easy to implement a bot, but it remains difficult to industrialize automation and scale out. Seek advice to both the technical implications of RPA tools, but more importantly equally how these tools impact process flows. The process owner should be center stage, while change and stakeholder management including IT are crucial.
- » **Explore the integration of unstructured data:** RPA is largely about well-defined processes and about standard operating procedure. A change in font size or a handwritten document can trip up those projects.
- » **Emphasize data curation:** Consequently, consider the implications of data curation at the beginning of a project to safeguard scale and agility of the deployments. Data really is becoming the new currency.
- » **Drive commonality across organizational boundaries:** To scale and to advance toward the notion of the As-a-Service Economy, organizations should seek to build out common automation platforms that can be adapted to use case.

As we suggested, the main purpose of the study is to broaden the discussion on Intelligent Automation and RPA. HfS welcomes and looks forward to extending these discussions to organizations we have yet to cover. The evolution of Intelligent Automation in general and RPA, in particular, is one of the most disruptive shifts our industry has witnessed. Thus, these discussions have to be embedded into the discourse of the **transformation of knowledge work**. Crucially, this requires new models and approaches. Organizations won't be able to reach the As-a-Service Economy with a legacy mindset.



## About the Authors

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Tom Reuner is Research Vice President, Intelligent Automation at HfS. Tom is responsible for driving the HfS research agenda for Intelligent Automation across the whole gamut ranging from RPA to Autonomics to Cognitive Computing and Artificial Intelligence. A key element in Tom's responsibilities is guiding clients and stakeholders on the evolution of Intelligent Automation including the coverage of new players and approaches. Furthermore, he is driving the research on application testing and service management. A central theme for all of his research is the increasing linkages between technological evolution and evolution in the delivery of business processes.

Tom's deep understanding of the dynamics of this market comes from having held senior positions with Gartner, Ovum and KPMG Consulting in the UK and with IDC in Germany where his responsibilities ranged from research and consulting to business development. He has always been involved in advising clients on the formulation of strategies, guiding them through methodologies and analytical data and working with clients to develop impactful and actionable insights. Tom is frequently quoted in the leading business and national press, appeared on TV and is a regular presenter at conferences.

Tom has a PhD in History from the University of Göttingen in Germany.

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## Phil Fersht



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Phil Fersht is Founder, CEO and Chief Analyst of leading global analyst authority for the services industry, [HfS Research](#). He is an acclaimed author, analyst and visionary in Global Business Services and Outsourcing, the Digital Transformation of enterprise operations and talent strategies. Fersht coined the terms "The As-a-Service Economy" and "OneOffice", which describe HfS Research's vision for the future of global operations and the impact of cognitive automation and digital technologies. Fersht was named Analyst of

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Fersht founded HfS Research in 2010 and has masterminded the development of the HfS organization as a leading analyst for the firm, in addition to steering the business operations. He is also author and creator of the most widely-read and acclaimed blog in the global services industry, entitled "[Horses for Sources](#)" and now entering its tenth year. Over the past 20 years, Fersht has lived and worked in Europe, North-America, and Asia, where he has advised on hundreds of operations strategy, outsourcing, and global business services engagements. During his career, Phil Fersht has worked at Gartner Inc. (AMR Research), directing the firm's BPO and IT Services practices and served as market leader for Deloitte Consulting's BPO Advisory Services, where he led numerous outsourcing and offshoring advisory engagements with Fortune 500 enterprises. He began his career with IT analyst IDC.

Fersht contributes regularly to media such as Wall St Journal, Business Week, Economist, The Times of India and CIO Magazine and is a regular keynote speaker at major industry events, such as NASSCOM, Global Sourcing Association, SSON, Sourcing Interests Group and the HfS Blueprint Sessions.

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# About HfS

## The Services Research Company™

HfS Research is The Services Research Company™—the leading analyst authority and global community for business operations and IT services. The firm helps enterprises validate their global operating models with world-class research and peer networking.

HfS Research coined the term [The As-a-Service Economy](#) to illustrate the challenges and opportunities facing enterprises to re-architect their operations and thrive in this era where emerging disruptive competitors are using digital platforms and cognitive computing that can wipe out traditional enterprises overnight. HfS' [OneOffice™ Paradigm](#) is centered on creating the digital customer experience and an intelligent, single office to enable and support it. HfS' vision is about helping clients achieve an integrated support operation has the digital prowess to enable its enterprise to meet customer demand - as and when that demand happens.

With specific practice areas focused on the Digitization of business processes and Design Thinking, Intelligent Automation and Outsourcing, HfS analysts apply industry knowledge in healthcare, life sciences, retail, manufacturing, energy, utilities, telecommunications and financial services to form a real viewpoint of the future of business operations.

HfS facilitates a thriving and dynamic global community which contributes to its research and stages HfS holds several [OneOffice™ Summits](#) each year, bringing together senior service buyers, advisors, providers and technology suppliers in an intimate forum to develop collective recommendations for the industry and add depth to the firm's research publications and analyst offerings.

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*HfS was named [Analyst Firm of the Year for 2016](#), alongside Gartner and Forrester, by leading analyst observer [InfluencerRelations](#).*