

IDC MarketScape

IDC MarketScape: Worldwide Intelligent Automation Services 2019 Vendor Assessment

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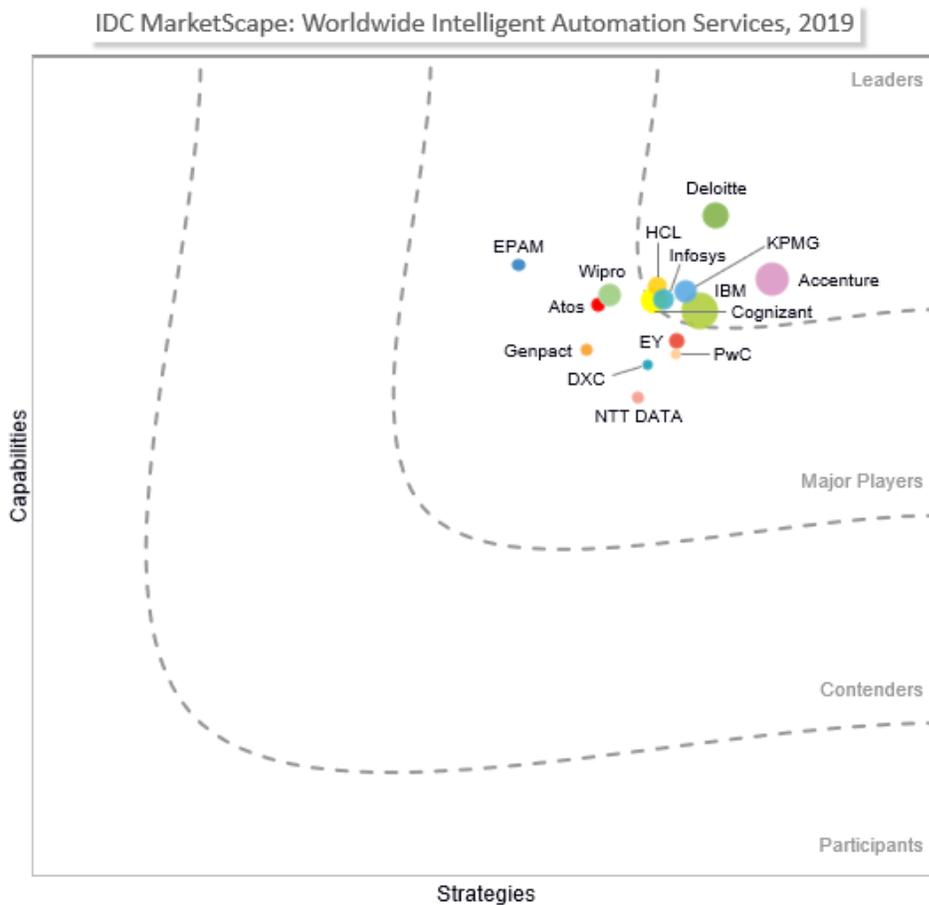
Ali Zaidi

THIS IDC MARKETSCOPE EXCERPT FEATURES ACCENTURE

IDC MARKETSCOPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Intelligent Automation Services Vendor Assessment



Source: IDC, 2019

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

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Intelligent Automation Services 2019 Vendor Assessment (Doc # US44934619). 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.

IDC OPINION

This IDC study represents a vendor assessment of the 2019 intelligent automation (IA) services market through the IDC MarketScape model. This research provides a quantitative and qualitative assessment of the characteristics that explain the success of a vendor in the marketplace and help anticipate its ascendancy. This IDC MarketScape covers a variety of vendors participating in the worldwide IA services market. This evaluation is based on a comprehensive framework and a set of parameters expected to be most conducive to success in providing IA services in both the short term and the long term. A significant component of this evaluation is the inclusion of the perception of IA services buyers of both the key characteristics and the capabilities of these providers. Buyers were surveyed across all three of IDC's macroregions. Key findings include:

- Across all IA services vendors, top areas of strength were functionality or offering strategy, delivery model strategy, and portfolio strategy, as well as the core capabilities of employee management (staff turnover and quality of resources), growth sustainability, and customer service.
- Improving operational efficiency and reducing costs were the top 2 business priorities of buyers adopting IA services, followed by strengthening customer relationships, driving revenue growth, and investing in 3rd Platform technologies to prepare for tomorrow's business needs. Vendors should align IA services portfolios to address these business priorities, as buyers' top measure of success of an IA services engagement is achievement of their desired business outcomes.
- With automation playing a central role in multiple business strategies, lines-of-business heads were the most common sponsors for IA services engagements among buyers IDC surveyed in 2019. Nearly 60% of sponsors overall were in roles outside the information technology (IT) function, such as CFO, CEO, or chief analytics/data officer. Project-based services, including business consulting, implementation, and custom application development, were the most common in IA services engagements.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

This research includes analysis of 15 IA services providers with global scale and with broad portfolios spanning IDC's research coverage. This assessment is designed to evaluate the characteristics of each firm – as opposed to its size or the breadth of its services. The inclusion criteria also dictate that at least 10% of revenue and 10% of head count need to be located in each macroregion (Americas, EMEA, and APAC). In addition, it is conceivable and in fact the case that specialty firms can compete with multidisciplinary firms on an equal footing. As such, this evaluation should not be considered a "final judgment" on the firms to consider for a particular project. An enterprise's specific objectives and requirements will play a significant role in determining which firms should be considered as potential candidates for an engagement.

ADVICE FOR TECHNOLOGY BUYERS

- **Business outcomes.** Consider your overall strategy for adopting IA, including the desired business outcomes as well as how (and by whom) solutions will be developed and managed across the organization. Seek out a services partner that understands your end goals and commits to working with you to achieve those business outcomes, including establishing appropriate KPIs for success, bringing use cases and innovation resources to the table, and helping you think through the impacts of incorporating IA into your organization and processes. Successful organizations partnered with IA services providers that helped them achieve their desired business outcomes; delivered reliable, accurate, and trustworthy IA solutions; and delivered innovation that produced results for them. Select a partner that demonstrates the ability to deploy IA effectively and will put your business needs first in developing a solution.
- **AI-enabled automation.** Select a services partner with a forward-looking platform and skills strategy that evolves along with the IA market. Many aspects of IA services can themselves be automated, such as using artificial intelligence (AI) to help with capturing, classifying, and converting unstructured and semistructured data into a machine-readable format for RPA bots. Look for services providers that have developed IP-based solutions to accelerate IA deployments. Of course, AI-enabled automation will never completely eliminate the need for human expertise to build IA solutions that integrate well into business workflows and deliver reliable, accurate, and trustworthy outcomes. Look for services providers with knowledge of the latest developments around industry and functional IA use cases, process reengineering, bias, ethics, security, regulatory compliance, and change management, in addition to core data science and automation skills.
- **Vendor selection.** Use this IDC MarketScape in contract negotiations and as a tool to not only short-list vendors for IA 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 based, or otherwise.

VENDOR SUMMARY PROFILE

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 the vendor's strengths and challenges.

Accenture

According to IDC analysis and buyer perception, Accenture is positioned in the Leaders category in this IDC MarketScape for worldwide IA services.

Applied Intelligence is both Accenture's community of practice launched in 2017 and its unique human-centered approach to apply deep industry and technical expertise to help clients use AI-powered data, analytics, and automation to achieve intelligence at scale. Accenture's end-to-end IA service offerings include strategy, data supply chain, analytics, and automation and managed services. The practice also offers packaged solutions catering to domain-specific IA use cases across the value chain, including, but not limited to, Applied Marketing and Sales Optimization, Applied Customer Engagement, Applied Supply Chain Optimization, Applied Fraud Prevention, and Applied Asset

Productivity. Enabling Accenture's delivery of IA services are proprietary platforms such as Applied Intelligence Platform, Intelligent Data Suite, Accenture myWizard, and Accenture SynOps Engine.

Strengths

Buyers rate Accenture highly for its ability to work with partners and deliver innovation that produces results for them, offer flexible pricing models, and resolve problems or issues related to customer service. Similarly, IDC rates Accenture highly in terms of its strategies around employee skills and retention, marketing, and channel improvement via alliances.

Challenges

IDC believes Accenture's sales and distribution strategy could be improved by adding a digital sales route that provides customers with the ability to purchase some IA services online. Such an addition could also help Accenture foster growth by targeting a nontraditional customer base. Also, Accenture's strategy to increase revenue per employee, though strong, could be improved further by increasing the use of alternative labor models such as subcontracting and crowdsourcing to deliver parts of projects without adding more resources internally.

Consider Accenture When

Organizations should consider Accenture when they are looking for a partner that can provide high-value skills, co-innovation, and high-touch customer service to apply IA to their specific business problem. Accenture should be on the short list if you are seeking a partner with a broad ecosystem of alliance partners to draw from to create a best-fit IA solution for your needs.

APPENDIX

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 covers a spectrum of business and technology choices that represent changing human-machine interactions depending on who analyzes data, who makes the decision, and who acts based on the decision. Intelligent automation can be applied across a hierarchy of tasks, activities, processes, or systems.

Intelligent automation services are utilized to assess, plan, design, implement, and operate the following:

- **Basic automation:** Automation at the most basic level includes the automation of rules-based tasks (units of work performed by a human or computer) and documented process rules across applications. These are generally repeatable tasks leveraging structured data and are addressed with basic technologies such as macros and scripts. With basic automation, unlike machine-augmented decision making or autonomous decision making, there are no predictive capabilities or integration with RPA software or cognitive technologies such as machine learning.
- **Machine augmented decision making:** Process automation (or RPA) is enabled by software tools that are programmed to automate processes that were formerly performed by a human by following a predetermined set of rules. When exceptions arise while using RPA, both humans and machines address them. RPA can use a combination of technologies to completely automate a task to enable processes to operate more dynamically.
- **Autonomous decision making, or decision-centric process automation:** Decision-centric process automation is enabled by systems or machines independently solving nondeterministic tasks by continuously receiving and analyzing data to discover patterns that predict a decision and offer a recommendation to improve it.

In addition, change management, assessment, design, and deployment of underlying information/data management architecture, process reengineering, and IA platform-enabled services are also considered part of IA services.

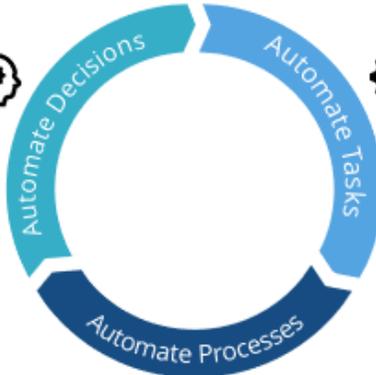
This IDC MarketScape covers the full life cycle of IA services (see Figure 2). For a detailed definition of the services markets illustrated in Figure 2, see *IDC's Worldwide Services Taxonomy, 2019* (IDC #US44916019, March 2019).

FIGURE 2

Intelligent Automation Services Value Chain

Autonomous Decision Making

Decision-centric process automation is enabled by systems or machines independently solving nondeterministic tasks by continuously receiving and analyzing data to discover patterns that predict a decision and offer a recommendation to improve it.



Basic Automation

Automates basic, rules-based tasks across applications with basic technologies such as macros and scripts, excluding any predictive capabilities.



Machine Augmented Decision Making

Process automation (or RPA) is enabled by software tools that are programmed to automate processes that were formerly performed by a human by following a predetermined set of rules. The augmentation of human capabilities can also be enabled by predictive and streaming analytics and cognitively enabled technologies such as machine learning and deep learning to enable processes to operate more dynamically.

Source IDC, 2019

Customer Perceptions of Intelligent Automation Services Vendors

A significant and unique component of this evaluation is the inclusion of the perceptions of IA 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 IA services engagement within their company. The survey findings highlight key areas where buyers expect IA services providers to showcase a range of capabilities. The buyers consider these capabilities a must-have for IA services to be able to fulfill the requirements of many business and IT issues that challenge the buyers.

LEARN MORE

Related Research

- *Market Analysis Perspective: Worldwide Analytics and Intelligent Automation Services, 2019* (IDC #US44537419, September 2019)
- *IDC PeerScope: Best Practices for Deploying Intelligent Automation* (IDC #US44119019, June 2019)
- *Worldwide Business Analytics Services Forecast, 2019-2023* (IDC #US44119119, June 2019)
- *IDC MarketScape: Worldwide Artificial Intelligence Services 2019 Vendor Assessment* (IDC #US44514819, April 2019)
- *Artificial Intelligence-Based Automation Evolution Framework* (IDC #US44524318, December 2018)
- *IDC FutureScape: Worldwide Analytics and Artificial Intelligence 2019 Predictions* (IDC #US44389418, October 2018)
- *Intelligent Automation Services Value Chain* (IDC #US44127518, July 2018)

Synopsis

This IDC study represents a vendor assessment of the intelligent automation (IA) services market through the IDC MarketScape model. This assessment discusses both quantitative and qualitative characteristics that explain success in the IA services market. This IDC MarketScape covers a variety of vendors participating in the IA 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 enterprises adopt IA solutions to reduce costs and improve IT and business operations, they need support from services providers to develop the right approaches for managing data, people, processes, and technologies to enable IA deployments to grow and thrive. Success in this supporting role will require services providers to demonstrate expertise not only in IA technologies but also in developing solutions that achieve customers' business objectives and address the human and organizational impacts of IA adoption," says Jennifer Hamel, research manager, Analytics and Intelligent Automation Services at IDC.

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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