

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 than 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