Market Guide for Hyperautomation Service Providers

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Initiatives: IT Sourcing Strategy Development and Execution

> Demand for hyperautomation services is growing, driven by demand for productivity and digitalization of work. Sourcing, procurement and vendor management leaders can use this Market Guide to identify providers to adopt and implement hyperautomation technologies.

Overview

Key Findings

■ Demand for hyperautomation is being driven by a need for digital transformation due to talent shortages, increasing economic pressures driving productivity improvement, unnecessary manual work and market challenges across most industry sectors.

■ The most successful consulting and system integration (SI) service providers are selling a combination of technologies in hyperautomation services. Larger providers are more successful when including business consulting services for a wider story of digital transformation or workplace of the future.

■ Hyperautomation service providers of various sizes are differentiating themselves with automation accelerators and combinations of homegrown assets. These proprietary tools are predominantly for analytics and workflow, accompanied by specialized deployment methodologies. Revenue from hyperautomation services in total is split 23% consulting, 44% build and implementation, and 33% managed services; which is the fastest growing part.

Recommendations

Sourcing, procurement and vendor management (SPVM) leaders responsible for selecting hyperautomation service providers should:

- Gain maximum clarity over whether your organization wants a service provider to rationalize your portfolio of hyperautomation software usage and create better use of hyperautomation and over how they will support your organization's continued optimization of these.

- Identify whether the service provider's skills align with the portfolio of hyperautomation software you already own or recently bought or whether you require impartial advice on new software.

- Evaluate service providers on the combination of business and technology accelerators the provider has invested in and their ability to explain how you would benefit from using these.

Strategic Planning Assumption(s)

- By 2025, productivity will be a top-five strategic business priority for CEOs.

- By 2025, 70% of enterprises in all industries will have engaged digital business model transformation services to implement analytics-driven business decisions and management capabilities.

Market Definition

Hyperautomation services comprise skills for consulting, as well as implementing and managing business and technology endeavors to improve a wide variety of organizational processing activities. Examples of hyperaumotation-enabling software tools include:

- Enterprise iPaaS

- Robotice process automation (RPA)

- Intelligent document processing (IDP)

- Email processing

- Low-code application platforms (LCAP)

- Process and task mining

- Business process automation (BPA)

- Content service platforms (CSPs)

■   Decision management suites (DMSs)

Market Description

The hyperautomation consulting, implementation and managed services market is composed of three categories of providers: global multioffering service providers, midsize automation service providers and local or small automation specialists.
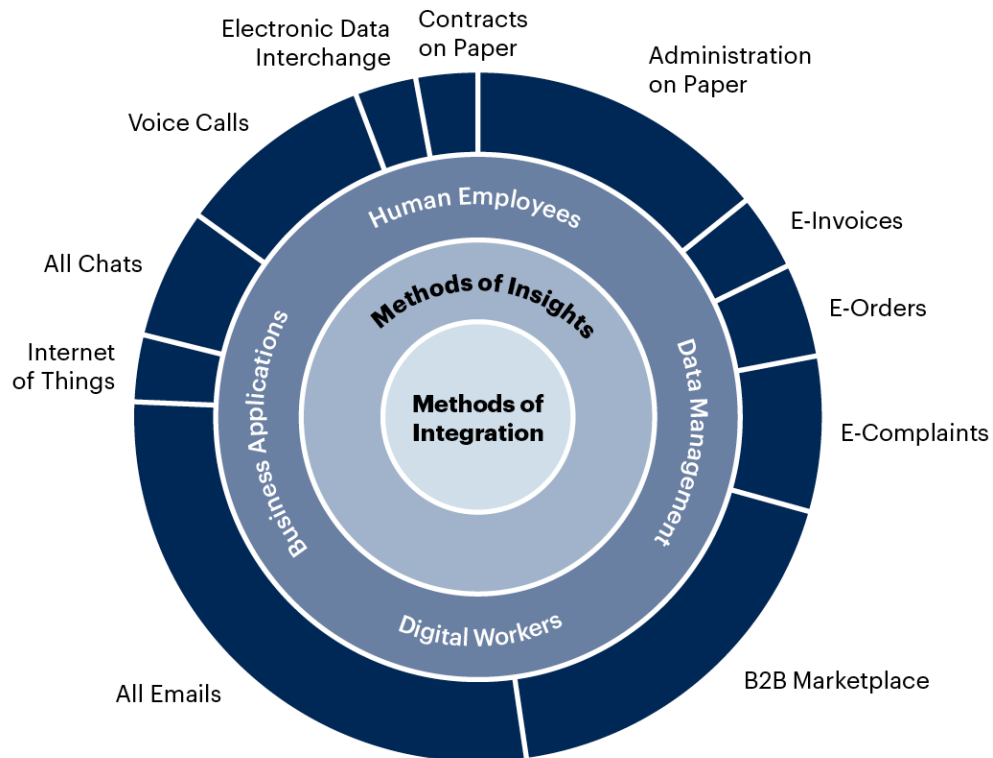
Figure 1 shows the main opportunities for hyperautomation software and services, which include integration, content ingestion, strategic orchestration platforms, process visibility and data insight.

■   Methods of communication for streamlining inbound and outbound content, including voice calls, chatbots, paper (such as invoices and contracts), photos, PDFs and emails.

■   Methods of insights via data fabric, analytics, process and task mining, and digital twins.

■   Methods of integration, such as point solutions, iPaaS, BPA, RPA, LCAP, APIs and rule engines.

■   Methods of platform orchestration for workforce and integration management.

Figure 1: Ingredients of a Hyperautomation Portfolio

Ingredients of a Hyperautomation Portfolio

Source: Gartner
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Common use cases for hyperautomation are driven by:

1. Solving problems, such as handling high volumes of returns processing in retail or streamlining onboarding of customers, employees, partners or suppliers

2. Grabbing opportunities, such as, being able to process new types of mortgages or loans quickly without waiting for the perfect architecture to be built

3. Complying with regulations, such as new reporting laws on sustainability, that need data from multiple locations compiling

Market Maturity

In Gartner's Hyperautomation Survey, [1] we asked each hyperautomation provider to assess how mature its total client base is across the five stages of Gartner's Hyperautomation Maturity Model (for the five levels, see Quick Answer: Use Gartner's Hyperautomation Maturity Model). Based on the survey data, 33% of the current clients have an intermediate understanding and maturity of hyperautomation, 21% have advanced and only 8% have mastery of hyperautomation. The four industries with the highest percentage of mature clients were banking, insurance, communications and healthcare. The industries with the lowest percentage of mature clients were education, transportation, power and utilities, and government.

Market Direction

Hyperautomation services market growth is being driven by the increasing need for support from professionals in improving operational excellence to streamline and optimize the role of the human in the processing activity. Using the latest technologies to remove manual repetitive work; respond more quickly and accurately to customer requests; and process work better, faster and cheaper is causing SPVM leaders to adjust their organizations' budgets to exploit the latest technologies.

Gartner estimates that more than 55% of global and midsize organizations have an average of four or more concurrent hyperautomation initiatives underway. More than 15% had more than 10 concurrent initiatives. [2]

> **Hyperautomation initiatives focus on digitizing documents and artifacts to ensure that their business and IT process workflows have the lowest possible amount of friction.**

Sourcing managers, facing pressure to drive the most value from IT investments, are seeking providers that can consult, implement and/or manage hyperautomation technologies in an efficient and effective manner to reduce the time to achieve business benefits. There is no shortage of organizations that can perform implementations, providing ample opportunity for sourcing managers to create a competitive environment to identify the most suitable implementer for their organization's needs.

Hyperautomation service providers also offer managed services for clients that want an end-to-end supported solution. As hyperautomation technology adoption grows, the demand for implementation and support talent drives churn in the market. The demand for managed services is expected to grow as more and more clients finish implementation engagements.

Market Analysis

The hyperautomation service market is a high-growth market, still attracting new entrants to challenge existing consultants, systems integrators and managed service providers. The intensity of competition has certainly increased in the last two years with many new entrants. In addition, there has been much consolidation of smaller providers to create greater service scale (for example, acquisitions by WNS, Roboyo Group and Ashling Partners).

With the explosion of interest in various aspects of generative AI, the automation consulting and integration market is set for a rise in automating tasks, especially customer service. Key trends in this market include preintegrated industry and process-indicative workflows and specialist business process knowledge.

Preintegrated Industry and Process-Indicative Workflows

Service providers are combining assets to build innovative platforms or fabrics, especially in the wake of the current interest in generative AI. Prebuilt packages, at easy-to-understand price points, can offer complex implementations and management at a lower cost than that of others, while potentially allowing faster scaling and operational efficiencies.

Note that, although this approach can offer increased speed to deployment, some clients have concerns about lock-in, reliability and expensive price points. Large competitors that are promoting preconfigured branded asset-based services include Accenture (Total Enterprise Reinvention), Capgemini (Enterprise Automation Fabric) and Cognizant (Neuro suite). Midsize competitors are acquiring specialist firms and making specific alliances, such as Roboyo's acquisition of Unite's insurance offerings.

Revenue from hyperautomation services in total is split 23% consulting, 44% build and implementation, and 33% managed services; which is the fastest growing part. [1]

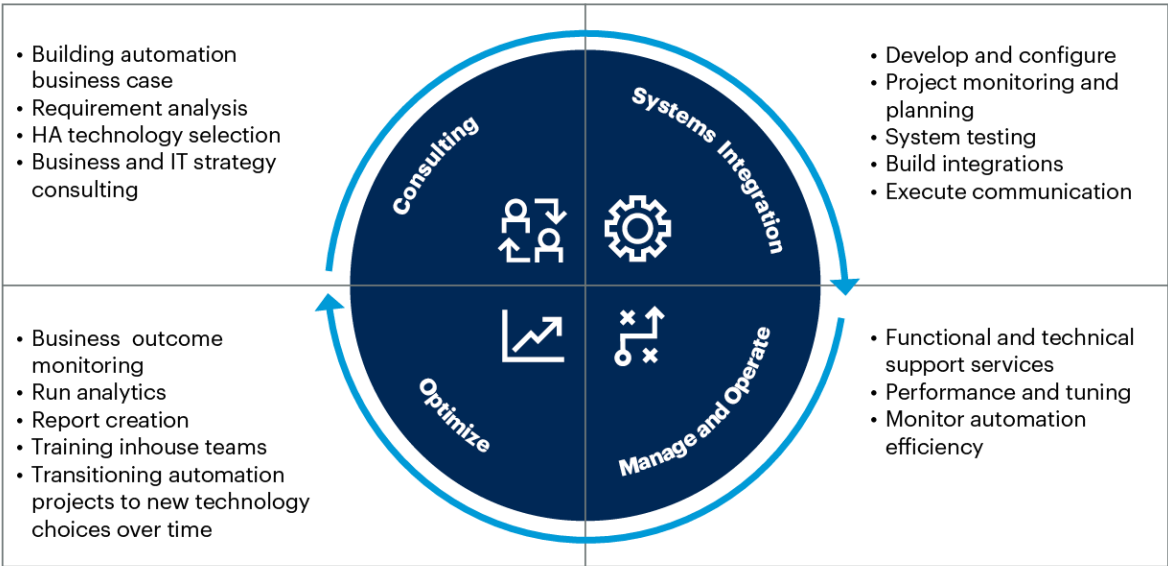### Specialist Business Process Knowledge

Look for a provider with specialist insight into your sector and who can list problems and identify opportunities that resonate with your organization's needs. Business use cases by sector will be differentiators. The aim is to have your leadership see their specific problems and opportunities through the lens of the service provider and how they will fix them.

Service Offerings

The hyperautomation services market can be broken down into four main categories — consulting, implementing, optimizing, and managing and operating (see Figure 2). Service providers in this market offer a range of these services. Note that most providers also offer resale of hyperautomation software, often within the same deals as services. However, this Market Guide focuses exclusively on the services in Figure 2.

Figure 2: Hyperautomation Service Offerings

Hyperautomation Service Offerings

- Building automation business case
- Requirement analysis
- HA technology selection
- Business and IT strategy consulting

Consulting

Systems Integration

- Develop and configure
- Project monitoring and planning
- System testing
- Build integrations
- Execute communication

- Business outcome monitoring
- Run analytics
- Report creation
- Training inhouse teams
- Transitioning automation projects to new technology choices over time

Optimize

Manage and Operate

- Functional and technical support services
- Performance and tuning
- Monitor automation efficiency

Source: Gartner
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Gartner

The definitions used for the categories in this Market Guide are as follows:

- **Consulting services:** This includes technology consulting services that are advisory services to help clients assess different technology strategies and, in doing so, align their technology strategies with their business or process strategies for their automation needs. Services are commonly delivered as a fixed-price selection process with potential follow-up time and material-based implementation support.

- **Systems integration:** This includes services to implement hyperautomation technologies. As an integrator, SIs combine component subsystems and ensure that the systems work well together. These implementations are usually charged as projects, last in duration from weeks to more than a year or years (depending on the complexity and size of the organization), and range in price from $50,000 to millions of dollars.

- **Manage and operate services:** This involves the complete management of the hyperautomation solution, from monitoring to updates and upgrades, as well as training. Providers will work with clients to improve their processes. The pricing models vary significantly and can include fixed, bundles of hours or tiered service structures.

- **Optimize services:** This involves specific post-go-live activities that may include health checks, value analysis and maximization, analytics, new report creation, and ongoing alignment to business strategy.

Representative Vendors

The vendors listed in this Market Guide do not imply an exhaustive list. This section is intended to provide more understanding of the market and its offerings.

Vendor Selection

Sources for the hyperautomation service provider list include published Gartner research, inquiries with end users, provider responses to Gartner survey and publicly available information. The hyperautomation consulting, implementation and managed services market is composed of thousands of service providers with regional and specialist skills that deliver these services. The providers in this Market Guide were selected as a sample of the market. The list is not a ranking and should not be interpreted as statements about the strength of a provider's offerings or its depth of expertise. Exclusion from this Market Guide does not, in any way, reflect the quality or credibility of other providers within this market (see Note 1 and Note 2).
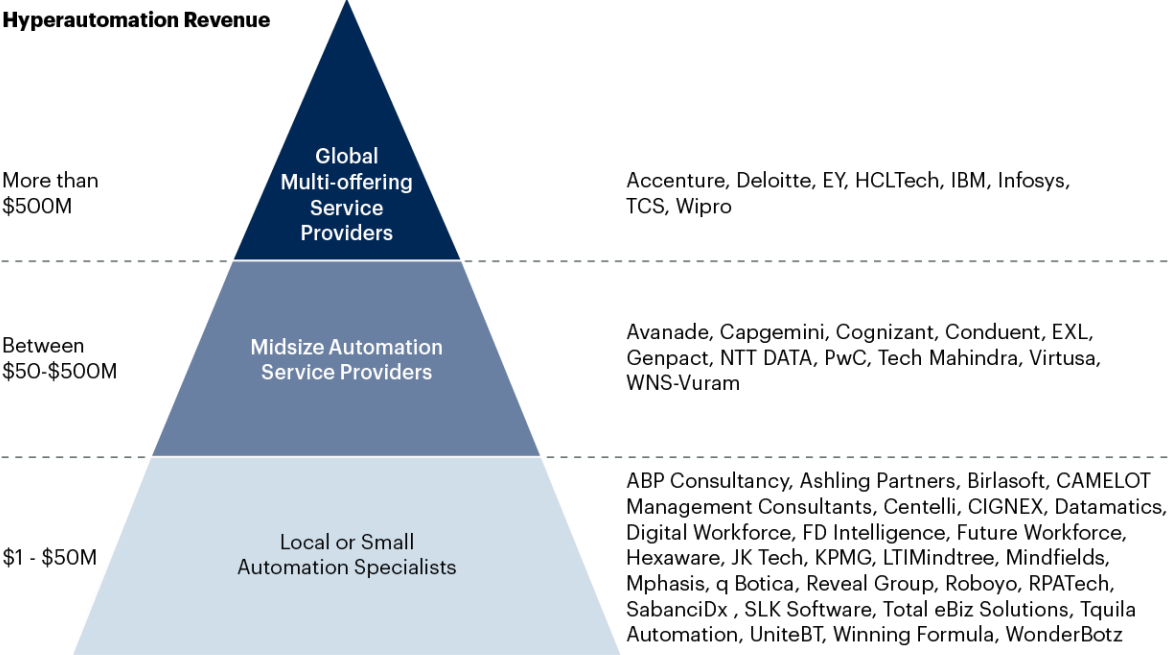
The providers are represented in Table 1. These providers cover some or all of the categories shown in Figure 1 and defined above. The data in Table 1 is a snapshot to provide a summary of the vendors' hyperautomation capabilities. Figure 3 provides a more extensive (though still not exhaustive) list of hyperautomation vendors.

The competitive landscape can be viewed as comprising of three categories of service providers:

- **Global multioffering service providers:** These providers have significant experience in consulting, system integration and managed services. Such providers have a good brand awareness and are often incumbent suppliers of applications services that can potentially extend to consulting, system integration and managed service offerings for hyperautomation with existing clients and new prospects.

- **Midsize automation service providers:** These are relatively newer consulting and integration providers, and they have mostly sprung up in the last five years or so. Their key value proposition is that they focus primarily on automation technologies and are often the most knowledgeable in RPA.

- **Local or small automation specialists:** These are automation software vendors entering from adjacent segments, including RPA, content management and conversational AI. Such providers can consult on their tools and related software partnerships.

List of Hyperautomation Service Providers

Hyperautomation Revenue

More than $500M	**Global Multi-offering Service Providers**	Accenture, Deloitte, EY, HCLTech, IBM, Infosys, TCS, Wipro
Between $50-$500M	**Midsize Automation Service Providers**	Avanade, Capgemini, Cognizant, Conduent, EXL, Genpact, NTT DATA, PwC, Tech Mahindra, Virtusa, WNS-Vuram
$1 - $50M	Local or Small Automation Specialists	ABP Consultancy, Ashling Partners, Birlasoft, CAMELOT Management Consultants, Centelli, CIGNEX, Datamatics, Digital Workforce, FD Intelligence, Future Workforce, Hexaware, JK Tech, KPMG, LTIMindtree, Mindfields, Mphasis, q Botica, Reveal Group, Roboyo, RPATech, SabanciDx , SLK Software, Total eBiz Solutions, Tquila Automation, UniteBT, Winning Formula, WonderBotz

Source: Gartner
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Gartner

Table 1: Vendor Summary

(Enlarged table in Appendix)

Name ↓	Geography Supported ↓	HA Consultants ↓
Accenture	Global	25,000+
Ashling Partners	North America	204
Capgemini	Global	20,000
Cognizant	Global	75,000
EY	Global	4,400
Hexaware	Global	1,835
IBM	Global	35,000
LTIMindtree	Global	8,000
Mphasis	Global	2,000
PwC	Global	450
qBotica	North America	200
Reveal Group	North America	131
Roboyo	Europe	600
UniteBT	North America, EMEA, APAC	71
Virtusa	North America, EMEA, APAC	954
Wipro	Global	48,333
WNS-Vuram	North America, EMEA	1,600
WonderBotz	North America, EMEA, India and Singapore	400

Source: Gartner (November 2023)

Vendor Profiles

Accenture

Accenture is an Ireland incorporated global technology services company.

It has invested in enhancing its capabilities through partnering and acquisition of emerging startups, which have fueled inorganic growth. These include Pega, MuleSoft, Celonis, Automation Anywhere, SS&C Blueprism, Kogentix, Mudano, End-to-End Analytics, Byte prophecy, Imaginea, Analytics8 and more.

Accenture has a large IA practice and a substantial partner ecosystem offering services across the technology delivery life cycle. This includes AI-infused automation across systems Integrations, application and infrastructure management, RPA, process mining, business process automation, IDP, LCAP, and API management services. Its Reinvention Console platform offering can develop client-specific business cases for IA. The platform has a suite of assets across industries, functions, services and markets with one-asset architecture, data and AI at the core. These assets are developed as stand-alone proprietary intellectual property (IP) or in collaboration with ecosystem partners and clients.

Accenture has made investments into its Reinvention Console, which has key platforms that include:

- **myWizard:** For system integration (SI) and application and infrastructure management (AI-infused operations)

- **SynOps:** For business operations

- **myNav:** For cloud operations

- **myConcerto:** For intelligent platforms

- **myDiagnostic:** For benchmarking and diagnostics

- **AI Navigator for Enterprise**

Each of these platforms has sizable patented/under-patent IP products that Accenture offers clients on license, subscription or managed service models.

Ashling Partners

Ashling Partners is a U.S.-headquartered professional services company. It has received growth capital investment from Thomas H. Lee Partners from its $900 million automation fund and a minor investment from Bain & Company.

Ashling Partners has partnerships with UiPath, Celonis, Microsoft, Nintex K2, ABBYY, Indico Data, Workato, Founda Health, Base64.ai and Apache Druid.

Ashling Partners has invested in enhancing its global delivery and skills base through four key acquisitions: Machina Automation, fourTENS, Botmata and TOUCH Intelligent Solutions. Machina Automation was an automation service provider focused on the energy industry. fourTENS was a U.S. service provider with capabilities in Microsoft and Nintex. Botmata was a Romania automation development company with a global delivery model. TOUCH Intelligent Solutions was an India-based automation development company.

Ashling Partners specializes in automation and innovative service models centered on value stream management. To support its hyperautomation services offerings, it has developed IP for three different stages of the life cycle: plan and discovery, build and delivery, and run and sustain. Ashling Partners' Ashling Brickbucket IP contains more than 500 reusable assets, such as RPA scripts, process mining connectors and IDP models. It also works with Ashling Advisory, which brings in industry experts to lead key verticals, and has created assets based on vertical issues.

Capgemini

Capgemini is a France-headquartered IT services and consulting company.

Capgemini has made several acquisitions to enhance its IA portfolio. These include Advectas (business intelligence and data science), Altran (product engineering), Rufus Leonard (service automation), and Quantmetry (data and AI). Notable partnerships include IBM, Snowflake, Informatica, Adobe, Parascript, OpenAI, Neo4j, OntoText and LeapYear.

Capgemini provides a range of RPA and hyperautomation services under its industrialization and automation (IA) practice. It continues to invest in innovation, talent, unified service offerings and expansion of products and services combining capability portfolios for digital, cloud, data, and artificial intelligence with intelligent process automation (IPA) value proposition and process and industry domain expertise.

It has developed the following assets for RPA and hyperautomation services:

- **Enterprise Automation Fabric:** An insights-driven, purpose-built, plug-and-play platform

- **IPA-TOM:** A framework to integrate unique business demands and automation practices

- **Digital Twin for Operations:** A platform and framework to create a virtual representation of the business function using process mining

- **IPA Intelligent Orchestrator:** A platform for workload allocation accelerator

- **IDEA by Capgemini:** A platform and framework for industrialized data and AI engineering acceleration

- **AI Glass Box:** Assets for accelerating model validation, tuning, model and data monitoring, and retraining decision; provides OneView MLOps

Cognizant

Cognizant is a U.S.-headquartered IT services company.

Cognizant has an integrated practice focused on enterprise solutions connecting both business and IT. Its practice combines services with Cognizant Neuro Business Processes to incubate, determine market gaps/needs and innovate solutions. It continues to invest in the growth and development of Cognizant Neuro Business Processes, an integrated automation ecosystem that features advisory capabilities, AI-powered tools, professional services, and domain-driven solutions.

Cognizant has also launched a citizen development program to provide operational services to clients globally. The program equips business users with various tools such as RPA, process mining and IDP. Cognizant's goal is to enable 60,000 associates within the company's intuitive operations and automation business unit, and it has currently trained approximately 20,000 associates.

Cognizant has also built the following tools to help clients with intelligent process automation:

- **Cognizant Neuro Business Processes:** Some offerings include automation workbench, interaction analytics, bot migration, low-code data pipeline tool and process intelligence.

- **Cognizant Neuro IT Operations:** It delivers cross-enterprise repeatable and scalable automation solutions.

- **Cognitive Neuro AI:** A platform for scaled AI applications that empower clients to achieve better solutions, faster.

- **HPA, RPA as a service:** A fully-managed robotic process automation service catering to specific domains (i.e., healthcare, mortgage, and lending and insurance).

EY

EY is a U.K.-headquartered professional services company.

EY's strategic alliance formation plans have been central to its strategy, and it has formal alliances with Appian, Automation Anywhere, SS&C BluePrism, Microsoft and Pega (among others). UiPath was its top alliance in 2021 and 2022, and it acquired other custom-made targets for point-solutions, mainly in the AI and analytics space.

EY has a strong portfolio of RPA and hyperautomation advisory services. It continues to invest in both partner and practitioner learning and development opportunities and in on-the-job skills improvement coupled with the latest industry lessons and certifications, addressing the structural interplay of automation, data and AI. Known as EY Badges, the program provides certifications on self-directed learning for practitioners, many complemented by self-assessed study through recognized providers such as Coursera, Udemy, and SAP SuccessFactors.

EY has developed a spectrum of tools and accelerators to address various aspects of the execution life cycle. Some of the tools are listed below:

- **EY AutomationIQ:** An analytics-based IA operations manager for complete visibility to RPA operations

- **EY CodeView:** An automated code review tool for automation code on UiPath, BP and AA

- **EY Sight:** An automated process mapping tool leveraging process and task mining principles

- **EY Operating Model:** A full life cycle operating model prebuilt in JIRA that reduces center of excellence (COE) set up and project management office (PMO) costs

Hexaware

Hexaware is an India-headquartered technology services company.

It offers industry-specific hyperautomation solutions for both business and IT automation that allow it to deliver business outcomes for clients by orchestrating capabilities across multiple tech solutions. Its partner ecosystem includes Microsoft, Amazon Web Services (AWS), Google, Automation Anywhere, UiPath, ServiceNow, AntWorks, Xceptor, Alteryx, Celonis, Hyperscience, ABBYY, Ephesoft, RapidMiner, Microsoft Power Automate, Workato, Pega, Appian and Indico Data.

Hexaware offers an end-to-end implementation model including process mining and discovery. It engages with the customer to design and set up an intelligent automation COE and to evangelize intelligent process automation adoption across the enterprise. It also offers tool-based process assessment and discovery through partnership with leading products such as Celonis, Process Gold, and Kryon.

Hexaware's process automation solution approach incorporates digital levers such as smart data intake, low-code application platforms, AI, ML, chatbots and voicebots. It has developed a unified, integrated platform called Tensai that offers end-to-end automation capabilities for technology and business operations. This platform serves as a strategic offering, and it leverages a range of technologies from RPA to AI technologies such as generative AI, cognitive optical character recognition (OCR), ML, natural language processing, speech recognition and image analytics.

IBM

IBM is a U.S.-headquartered IT services and consulting company.

IBM Consulting's extreme automation practice leverages capabilities such as process mining, generative AI-led business automation solutions and assets across the ecosystem and partners including IBM research, IBM technology, Celonis and UiPath to drive enterprise process transformation. It has also acquired companies to expand its automation offerings including Octo U.S. Federal Government (digital transformation services), Neudesic (hybrid cloud and AI), Envizi (AI-powered software), Sentaca (hybrid cloud consulting) and Dialexa (product engineering).

IBM has a large extreme automation practice that aligns business and IT to power outcomes with digital innovation. It provides RPA with AI-led capabilities and collaborative design thinking workshops leveraging its IBM Garage methodology with existing use case libraries to co-create, co-execute and cooperate AI-led automation solutions with clients. It offers process mining and an RPA service that includes unattended bots, attended bots, intelligent virtual agent chatbots, OCR, intelligent document processing, automation workflow, decisions and content management solutions.

IBM has the following suite of tools and assets to help clients with intelligent automation:

- IBM-patented design-thinking-led automation quotient

- **Digital COE:** An end-to-end automation life cycle governance tool

- **watsonx Orchestrate:** An AI-powered intelligent orchestration tool for complex business automation

- **AI development toolkit**: Offers tools and capabilities to build GenAI solutions

- **Automation Operations Command Center (AOCC):** Manages automation across the enterprise

LTIMindtree

LTIMindtree is an India-headquartered global technology consulting and digital solutions company following the merger of Mindtree and LTI in November 2022.

LTIMindtree has partnerships with several automation and cloud service providers, including UiPath, Automation Anywhere, SSC&C Blue Prism, Pega, Appian, WorkFusion, Microsoft, AWS, Kofax, ABBYY, Xceptor and Google. It acquired NxT Digital Business, an Industry 4.0 innovator, in 2021 as a strategic investment to provide clients with data-driven operational insights and advanced analytics. LTIMindtree offers services such as advisory, implementation, value-added managed services, and the establishment of center of excellence (COE). It has invested in tool certifications, technology and leadership training and an automation academy for skill transformation. Its internal business process automation (BPA) COE develops architects and presales and domain consultants for automation solution design, market research and developing accelerators.

It has made investments in the following proprietary platforms, accelerators and frameworks for enhanced customer offerings:

- **HyperWeaver:** A hyperautomation platform that integrates process discovery, bot development and governance

- **Aspect:** An intelligent document processing platform to extract and process data

- **3i Discovery Framework:** Assesses automation potential from the current state and identifies areas for improvement

- **RAPID 2.0:** An end-to-end automation delivery framework encompassing process discovery, pilot, design, implementation, deployment, operation and training

- **Intelligent Bot Manager:** Optimizes bot utilization by distributing workloads across underutilized bots

Mphasis

Mphasis is an India-headquartered IT services and consulting company.

Mphasis has made several acquisitions to expand its service offerings: Stelligent, Datalytyx and Blink UX. Stelligent is a technology services company specializing in DevOps and DevSecOps solutions. Datalytyx is a DataOps specialist in the Snowflake and Talend ecosystems. It provides next-gen data engineering, data operations and master data management solutions. Blink UX is a user experience research, strategy and design firm that creates transformative digital products, brands and experiences.

Mphasis set up Mphasis.ai, a business unit integrating capabilities of NEXT Labs (R&D wing leveraging patented AI solutions), Sparkle Innovation Ecosystem (partnering with startups), the Mphasis' hyperscalers network, partnerships with Kore.ai and Databricks, to empower clients to unlock productivity and drive efficiency through generative AI.

It has developed the following tools and accelerators:

- **DeepInsights:** A cognitive computing platform that conducts analytics on structured and unstructured data sources leveraging large language and vision models

- **Optimize.AI:** AI-driven event analytics of customer behavior using event logs, automated process discovery and journey analytics

- **InfraGenie:** Mphasis AI-enabled solution for managing a hybrid multicloud enterprise that enables proactive, highly automated, zero-touch service delivery and operations management

PwC

PwC is a U.S.-headquartered IT services company.

PwC's core automation partners include UIPath, Automation Anywhere, Appian, Alteryx and Microsoft. Additional key alliances include ABBYY (OCR/ICR) Celonis, Mendix, OutSystems, Whatfix/WalkMe, Salesforce, ServiceNow and SAP.

PwC's focus is on RPA, augmented intelligence and conversational intelligence. It helps its clients co-create solutions and manage the life cycle from prototype to full-scale production. PwC has created PwC Labs and Experience Centers, which have dedicated teams focused on identifying, building, deploying, and scaling automations to support their internal processes. Its digital tools and pretrained IA accelerators are modular technological building blocks that have built-in industry and digital expertise.

PwC has developed the following tools:

- **Process discovery:** Collects granular information about business workflows

- **Intelligent automation opportunity assessment tool:** Conducts opportunity assessments and develops business cases for intelligent automation consistently

- **Process Intelligence framework and the digital twin:** Insight generator assets to mine process data and simulate change interventions without real-world risks

- **Dynamic bot optimization framework (DBOF):** Used for load balancing and optimum utilization of bot licenses

qBotica

qBotica is a U.S.-headquartered company founded in 2017.

qBotica has a platinum partnership with UiPath that has paved the way for a managed "automation as a service" offering, and it has created templates and automation profiles. Additionally, qBotica's partnership with Snowflake underpins its commitment to harnessing cutting-edge technology and enhancing data-driven strategies. Other partners in qBotica's portfolio include Microsoft and Google.

qBotica is building an ecosystem powered by intelligent automation. Its portfolio includes proprietary process mining, task mining solutions, smart document processing techniques and advanced conversational AI. qBotica is creating automation accelerators and industry-focused solutions that are built on its more general services heritage.

qBotica has built the following industry- and process-specific offerings for its portfolio:

- **Mortgage Processing Accelerator**: Provides document classification and extraction features tailored for loan processing and origination systems.

- **Healthcare Accelerators**: This offering weaves an automated RPA fabric that links multiple EMR systems. It also streamlines claims processing and facilitates seamless clinical data extraction.

- **Intelligent Quotes Automation**: Leveraging the prowess of NLP, this solution automates quotation processes.

- **Intelligent Invoice Automation**: Offers a hassle-free onboarding experience owing to its extensive prebuilt ERP integrations.

Reveal Group

Reveal Group is a U.S.-headquartered intelligent automation services company founded in 2005 with offices in the U.S. and Canada.

Reveal Group uses alliances as key go-to-market channels and categorizes them in strategic alliances. These partnerships include Bain & Company, FTI Consulting, A&M, AlixPartners and Kearney. It has contracting alliances with Ampcus, PIP and Synergy Group, as well as technology and offshoring alliances with Practia and RPASOFT.AI. Reveal Group has built partnerships with leading technology companies in the intelligent automation space such as UIPath, SS&C BluePrism, ABBYY, C TWO, Indico Data, IBM and Microsoft.

Reveal Group offers RPA, IDP, NLP, data and analytics, process mining, and managed services. It provides accredited training courses to help build internal knowledge and skills, and it has trained more than 2,000 people for more than 150 clients. Reveal Group has built Reveal RoboSuite accelerator tools and uses them as a differentiator for consulting, implementation and AMS services.

The RoboSuite offers the following tools:

- **Reveal RoboDesigner:** Reduces configuration time and effort by instantly creating automation components to best practice standards

- **Reveal RoboReview:** Analyzes and improves the development of automation components by developers

- **Reveal RoboDeploy:** Eliminates manual procedures when deploying automations

- **Reveal RoboManager:** A web-based RPA program methodology technology that supports the RPA life cycle

Roboyo

Roboyo is a Germany-headquartered hyperautomation professional services company founded in 2015. It has more than 600 employees.

Roboyo has made acquisitions to increase both its international footprint and its diversity of offerings. These acquisitions include Procensol, WeMake, Lean Consulting, JOLT Advantage Group and AKOA. Procensol is a low-code pure-play company in the U.K. and Australia, WeMake is a European software and security expert, Lean Consulting is a U.K.-based process excellence expert, Jolt Advantage Group is a U.S.-based IPA expert, and AKOA is a Europe-based IPA.

Roboyo has built dedicated assets of ready-made modules for RPA, IDP and low-code projects to accelerate development from 5,000 automation projects with 500 clients housed in the Roboyo Module database.

Roboyo assets include the following:

- Streamlined accounts payable processes by integrating RPA and an intelligent document processing (IDP) solution.

- Signing and workflow solution featuring a tailor-made connector to a signing solution provider, Signaturit, ensuring the secure storage of documents.

- A conflict-of-interest application that is configurable within Appian, serving as a tool for declaring conflicts of interest and defining escalation paths.

- Prebuilt knowledge management solution that utilizes vectorization and harnesses LLM capabilities to enable effortless document and file searching and querying across the entire enterprise.

UniteBT

UniteBT is a Turkey-headquartered IT services company with offices in the U.S.

In 2023, Unite launched its new cloud, consumption-based automation platform (IDA). Technology partnerships include UiPath, ABBYY, SS&C Blue Prism, C TWO, ServiceNow, and Microsoft. It has a global partnership with EY, has entered into an alliance with C TWO, called C TWO Consume powered by Unite and has added several more white-label partners to increase volume and capabilities to its platform that supports SS&C Blue Prism and UiPath.

In 2015, UniteBT was the first adopter of RPA in Turkey for its own IT service management and technology outsourcing businesses. It developed a consumption pricing and usage service automation business in 2016 using its experience in business process outsourcing (BPO). This led to its robots as a service (RaaS) consumption-based platform, positioned as digital BPO. UniteBT has developed its COE to manage digital workers around key standards. UniteBT utilizes ServiceNow to manage service catalogs for each process with preagreed SLAs, exception management and escalation management, as well as workflow management.

UniteBT has built a digital operations platform to provide oversight of the following automation technologies: RPA, document processing, conversational AI, communication mining, and reporting tools that allow customers to monitor transaction details, SLAs and incidents.

Virtusa

Virtusa is a U.S.-headquartered technology services company.

Over the last three years, Virtusa has invested in building a partner ecosystem across RPA, IDP, process mining/task mining, conversational AI, low-code application platforms, data and cloud. Virtusa has partnered with UiPath, Automation Anywhere, SS&C Blue Prism, Microsoft, AWS, Google Cloud Platform (GCP), ABBYY, Celonis, StereoLOGIC, Pega, IBM, Kore.ai, Unqork, Appian, ServiceNow and PagerDuty (Rundeck).

Virtusa offers solutions for both business and IT automation that allow it to deliver business outcomes for clients by orchestrating capabilities across multiple tech solutions. Virtusa's AIRIS is a desktop analytics platform that helps monitor user actions and converts them into requirements. Accello is an in-house RPA solution, and ticket triaging solution is its AI/ML-based incident management automation solution, which aims at increasing agility in the incident troubleshooting process. Automation Intake is a platform built as an enabler for hyperautomation in the enterprise. This platform is used to establish traceability of automation opportunities from qualification, assessment and delivery to realization.

Virtusa's accelerators and solutions are developed under a single platform called Hive. Hive brings together all Virtusa's code assets under a single umbrella with common enterprise standards and visibility across the corporation.

Wipro

Wipro is an India-headquartered IT services company.

Wipro provides RPA, cognitive process automation and dynamic workflows as part of its IPA practice. It has custom-built components for data extraction, decision models, content processing and other IPA-specific capabilities. It has set up 18 digital pods across the globe to invest in research projects on predictive and prescriptive analytics, probabilistic reasoning and deep neural nets. It continues to expand its automation capabilities by investing in startups through its Wipro Ventures.

Wipro assists clients with innovation center, command center and automation lab setup. It provides a dedicated team with technical and functional expertise to run the command center, find opportunities for improvement and build a real-time dashboard using data visualization. It has also built specific industry solutions for marketing, contact centers, supply chain, shared services, legal and procurement.

Wipro has built the following assets to provide cognitive and automation capabilities, including:

- **Wipro HOLMES:** An AI platform to help enterprises hyperautomate processes

- **BaseTM:** A business process platform

- **Talosafe:** An intelligent automation platform

- **Harmony:** Process-level knowledge management

- **Intelligent Underwriter:** Provides assistance to underwriters

- **Cognitive search:** Search with deep learning features

WNS-Vuram

WNS-Vuram is a U.S.-headquartered company and an arm of WNS. It offers end-to-end integrated services across its hyperautomation suite (process mining, intelligent document processing, iBPMS and RPA).

WNS-Vuram has built-industry specific solutions across banking and financial services, insurance, shipping and logistics and cross-industry solutions across finance and accounting, procurement, human resources, and customer experience. With its wide partner ecosystem, it builds proprietary solutions combining WNS IP with partner technology platforms and solutions, along with frameworks, assets and accelerators. It is also focused on incorporating GenAI capabilities into its productized offerings and hyperautomation services, thereby offering seamless end-to-end automation workflows.

WNS-Vuram, with its domain centers of excellence, focuses on domain know-how and the ability to understand industry needs in depth to provide solutions that deliver strong, sustainable outcomes for its customers. It has made investments in co-creation labs in India, London and New York, incorporating a Hyperautomation Lounge Offer (HALO) sandbox environment for clients.

Some of WNS-Vuram's industry-specific and cross-industry solutions include the following:

- **Freight Automation**

- **Supply Chain Management Analytics**

- **Insurance-in-a-Box**

- **London Market Underwriting Workbench**

- **Rapid Claims**

- **Hospital Lease Management**

- **TrustHall:** End-to-end contract life cycle management

- **TalentHall:** End-to-end employee life cycle management

- **Card Dispute Management System**

- **ESGHall**

- **Dynamic Case Management**

WonderBotz

WonderBotz is a U.S.-headquartered full-service intelligent automation services and solutions company.

WonderBotz has combined with Invoke Consulting to offer prebuilt solutions on a cloud SaaS basis using its iPaaS capabilities and ecosystem partners.

In addition to iPaaS, WonderBotz provides hyperautomation capabilities, prebuilt solutions as a service, software, people and infrastructure as part of its managed service offerings. WonderBotz partners with SS&C/Blue Prism, UiPath and Automation Anywhere to utilize their tools in a managed services model. Its investments in AI-driven process and task mining enable it to identify automation opportunities, generate as-is processes to speed new development and scale and expedite training of conversational AI tooling and other next-generation technologies.

WonderBotz provides prebuilt solutions in finance and accounting for procure-to-pay, record-to-report and order-to-cash. The solutions are mainly focused on the finance and accounting space with some expansion into healthcare and supply chain.

WonderBotz has developed IP in the following categories:

- Managed cloud offering (ARIA Cloud): A single cloud offering that allows customers to turn on many best-of-breed IA solutions.

- Prebuilt solutions: These products include IA technology and use cases based on user experience.

- Innovative skill acquisition: A team-as-a-service model.

- ARIA UX: Serves as a human-in-the-loop user experience for automation.

Market Recommendations

Sourcing executives and IT leaders have a wide range of choices when looking at hyperautomation services providers. They need to understand the provider's offerings and pricing models, especially the tools and capabilities with which they are most experienced. They also need to create a competitive environment and engage with several potential providers.

SPVM leaders selecting a partner for hyperautomation services should:

- Use this Market Guide to identify your initial list of service providers. Shortlist the service providers that most closely align with your needs.

- Conduct thorough due diligence not only on the implementer, but also on the key resources that it assigns to the implementation. Ask for the commitment of a few key resources and check their background and experience.

- Use Gartner's Hyberautomation Maturity Model (see Quick Answer: Use Gartner's Hyperautomation Maturity Model) to assess your organization's current level of hyperautomation maturity and decide how to begin your journey to a higher level.

- Select a hyperautomation services partner by assessing your strategy and matching the providers' offerings to your organization's requirements. Evaluate the ability of each partner to align its services to the expected outcomes in terms of hyperautomation strategy, timing, and improved cost and service delivery performance to ensure desired business outcomes are obtained.

- Prioritize use cases that can immediately leverage hyperautomation to realize quick wins. Focus on expanding from a single use case to a range of use cases across multiple platforms and technologies.

- Give preference to service providers that have a demonstrated track record of providing multidisciplinary teams that support clients' business-based product priorities by enabling effective collaboration and workflow.

Evidence

[1] In March 2023, Gartner contacted 60 service providers in the hyperautomation market to understand the competitive landscape, competitive trends, general market dynamics and the competitive stance taken by the providers. We used a questionnaire method to study this market. Forty-three providers responded to this survey.

[2] Gartner delivered two hyperautomation webinars on 1 December 2020 and 8 June 2021; both showcased that more than 56% of those surveyed had four or more concurrent hyperautomation initiatives.

Additionally, Gartner's 2021 Hyperautomation Survey showcased that 55% of business technologists were engaged in an average of four automation initiatives in the past 12 months. The study was conducted online during March 2021 among 558 business technologists from North America (n = 226), Europe (n = 146), Latin America (n = 78) and the Asia/Pacific region (n = 108). Results of this study do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

Note 1: Representative Vendor Selection

The providers named in this guide were selected to represent the hyperautomation services consulting, implementation and managed services market. Sources for this list are published Gartner research, inquiries with end users, provider briefings and publicly available information. Determinations are based on Gartner estimates. This is not a ranking and should not be interpreted as statements about the strength of a provider's offerings or its depth of expertise.

Note 2: Gartner's Initial Market Coverage

This Market Guide provides Gartner's initial coverage of the market and focuses on the market definition, rationale for the market and market dynamics.

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

Competitive Landscape: Hyperautomation Service Providers

Forecast Analysis: Hyperautomation Enablement Software, Worldwide

Emerging Tech Impact Radar: Hyperautomation

Infographic: Which Technologies Should You Use for Hyperautomation?

Table 1: Vendor Summary

Name ↓	Geography Supported ↓	HA Consultants ↓
Accenture	Global	25,000+
Ashling Partners	North America	204
Capgemini	Global	20,000
Cognizant	Global	75,000
EY	Global	4,400
Hexaware	Global	1,835
IBM	Global	35,000
LTIMindtree	Global	8,000
Mphasis	Global	2,000
PwC	Global	450
qBotica	North America	200
Reveal Group	North America	131
Roboyo	Europe	600
UniteBT	North America, EMEA, APAC	71
Virtusa	North America, EMEA, APAC	954

Name ↓	Geography Supported ↓	HA Consultants ↓
Wipro	Global	48,333
WNS-Vuram	North America, EMEA	1,600
WonderBotz	North America, EMEA, India and Singapore	400

Source: Gartner (November 2023)