



RPA Provider Blueprint Snapshot

Excerpt for Pegasystems

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Introduction

The pace of change and innovation ever since HfS Research collaborated with Blue Prism to coin the phrase and concept of Robotic Process Automation (RPA) back in 2012, has been nothing short of astounding. In the early days of the market development, the communication focused on RPA as a turn-key solution, being non-intrusive, low risk and (more or less guaranteed) short-term cost savings. While simplistic and largely unrealistic, one can't blame the tool providers for this stance as the large service providers and BPOs generate most of their revenues with costly system integration to overcome media and process breaks as well as with labor arbitrage. Within three years the emphasis has changed from guaranteed short term cost take out on a client specific, sub-process level to increasingly emphasizing an end-to-end process point of view with a focus on the transformation of processes and service delivery. Having taken stock of the broader RPA market dynamics and the capabilities of service providers in our 2016 RPA Premier League Table, this Blueprint Snapshot is expanding those themes to evaluate the leading RPA tool providers from a market perspective rather than focusing on functions and features. At the same time, the announcement of a free RPA product by WorkFusion is crystalizing many questions as to what the key constituents of an enterprise RPA solution really are. The fundamental question is how innovations like RPA are helping process owners to transform their processes to move to digitized and increasingly automated business processes. Simply put, the focus has to be on change management and helping clients to overcome silos and organizational stovepipes – not individual tools or technologies. Thus, the context is all about service delivery and aiding the sourcing decisions aiming to transform delivery strategies.

Intelligent Automation and RPA are not yet commonly defined

Intelligent Automation in general and RPA are in the eye of the beholder as the market lacks a common understanding or even robust definitions. This stems both from the nascent phase of market development as well as from the reluctance of the large service providers to educate the market. While nothing is defined in the context of automation, the common denominator in all the approaches is decoupling routine service delivery from labor arbitrage. However, this is not only the common denominator but also cause for widespread disruption, largely on the supply side as providers are struggling to transition to business models that no longer are predicated on labor arbitrage.

Against this background, an industry-wide working group led by Lee Coulter and AJ Hanna from Ascension Health under the umbrella of the IEEE standards body, with the participation of the leading RPA tool providers and consultancies, is doing sterling work to drive a taxonomy and common understanding of the different building blocks of Intelligent Automation. Yet, it will take considerable time until these suggested definitions will be adopted by the broader industry. The IEEE definitions of RPA are a useful reference point to describe the scope of this Blueprint evaluation.

- » **"Robotic Process Automation (autonomous)":** Preconfigured software instance that uses business rules and predefined activity choreography to complete the execution of a combination of processes, activities, transactions, and tasks in one or more unrelated software systems to deliver a result or service with human exception management.
- » **"Robotic Process Automation (agent assist)":** Computer application that makes available to a human operator a suite of predefined activity choreography to complete the execution of processes, activities, transactions, and tasks in one or more unrelated software systems to deliver a result or service in the course of human initiated or managed workflow.

These approaches can be applied in use cases such as digitizing the process of collecting of unpaid invoices, which involves mimicking manual activities in the RPA software, the integration of electronic documents and generation of automated emails to ensure the whole collection process is run digitally and can be repeated in a high-throughput, high-intensity model. Therefore, the emphasis in our evaluation will focus on enterprise grade transaction execution and sourcing benchmarks, complemented by characteristics such bot productivity, input, throughput, output, as well as liability.

However, looking at the diverging use of the RPA moniker that we have highlighted in Exhibit 1, it becomes abundantly clear that we are dealing with an undefined market and consequently with blurred perceptions.

Exhibit 1: Positioning with the RPA moniker



Source: HfS Research 2017

To provide more clarity on the provider landscape, we have outlined from which propositions RPA capabilities have evolved. Providers like NICE and Kryon Systems are expanding from front office capabilities, while Pega and Be Informed progress from a BPM focus. The same applies for ERP or productivity tools. Perhaps not surprisingly the biggest group is what we have termed “other/access to sourcing decisions”. And the latter is crucial for understanding the inflationary use of the RPA moniker: It is all about getting access to the table where the sourcing decisions around automation are being taken. Tactically and pragmatically this approach by providers like Ayehu, Enablesoft or Rimilia is understandable. Yet, suffice it to say, it is not helping to overcome blurred market perceptions.



Against this background, in our view, the best way to provide clarity as to the market impact of the various tools is to play back how the leading service providers are positioning themselves. The indirect channel accounts for around 70% of total RPA revenues. It is the partner ecosystem that facilitates the transformation of service delivery and processes. RPA tools deployed without a mindset of transformation is likely to remain nothing more than Band-Aid. This way the picture is starting to become much clearer. In terms of strategic partnerships, Blue Prism and AutomationAnywhere are dominating with UiPath increasingly entering the fray. Pega/OpenSpan and WorkFusion with different approaches are complementing those partner relationships. NICE, Kofax Kapow, Kyron, Exilant, and Redwood are selectively added to that dominating trio.

The biggest misconception and confusion is caused by the related proposition of desktop or Robotic Desktop Automation (RDA). It is here where there is so much smoke and mirrors in the industry. The IEEE definition for agent assisted RPA has already provided pointers for that. In simplistic terms, RDA has evolved from screen scraping in the front office where disparate sets of information were integrated to support call center agents. Thus, RDA is focused on quick deployments on desktop level, typically customer contact agents. In RDA, activities are being automated, while in RPA (back-office) processes are automated. On the danger of over-simplifying, in RDA the agents are passing on tasks to robots, while in RPA the robot passes on tasks to agents. To make life even more complicated, leading RDA providers like NICE and Pega started to offer both RDA and RPA solutions. However, the bulk of their business tends to be in RDA. Hence, despite strong revenues, we would position them more as RDA than RPA vendors. Yet, we are also seeing RDA being sold into back-office operations. In the end it is all about the clarity of the use cases, there is no right or wrong approach to RPA. Changing to a strategic market perspective, if HfS' contention is right that organizations have to evolve toward the notion of the Digital OneOffice, then the question is whether back-office focused BPOs largely leveraging RPA will cannibalize the revenue of front-office oriented BPOs using RDA or vice versa? The same logic can be applied on a tool level for building out in-house capabilities as part of Automation Centers of Excellence (CoE). In the end, tool selection will come down to use cases, requirements, and commercials. And many of these requirements continue to be low level as organizations are happy to apply the Band-Aid to broken or badly designed processes rather than re-engineering them.

It is all about the clarity of the use cases, there is no right or wrong approach to RPA

But there is another issue where smoke and mirrors are distorting the market. How much scripting and coding is actually needed to get solutions off the ground? Many contracts are largely a Managed Services agreement. This is confounding what automation and RPA should be all about, namely the decoupling of routine service delivery from labor arbitrage. While the integration of attended and un-attended automation especially by RDA-centric providers can be a useful scenario for clients and partners, the level



of coding and scripting is distorting the assessment of how the industry is progressing. We hear many anecdotal references, but it is very difficult to corroborate those. But our assessment of these issues is feeding into the category “actual delivery of services”. Similarly, there are many presentations suggesting either “low code” or “no code” required when deploying these tool sets, however, the reality looks often very different.

Understanding the methodology behind the RPA Blueprint Snapshot

The RPA Blueprint Snapshot is building on and expanding the discussions with stakeholders as well the research of HfS’ Intelligent Automation practice. Our blueprints are based on multiple client interviews, interviews with advisors, service providers and internal analysts who have experience working with the RPA platforms. Our scoring system only allows for 10% of analyst judgment, where we made the case for your strong innovation. Our weightings are partially based on importance criteria we glean from our State of Industry survey with KPMG which covers over 450 major enterprises. Put in other words it is a market-led assessment from a sourcing perspective which differs from the function/features approach more attuned to software that some our peers have recently used.

With that in mind, we are leveraging the insights from our **F&A BPO Blueprint**, the broader context of the **Intelligent Automation Blueprint** as well as the **RPA Premier League Table**. On top of that, we have reached out to the leading RPA providers with an RFI to expand on specific issues thus leading to discussions on capabilities as well as vision. Based on that we have evaluated the providers against the following criteria:

» Execution:

- Actual delivery of services
- Scalability and repeatability of deployments
- Structured approach to partnering, key partner references
- Success of partnerships within the broader RPA and Cognitive ecosphere
- Support and training of clients and partners
- Thought-leadership and stakeholder management



» Innovation:

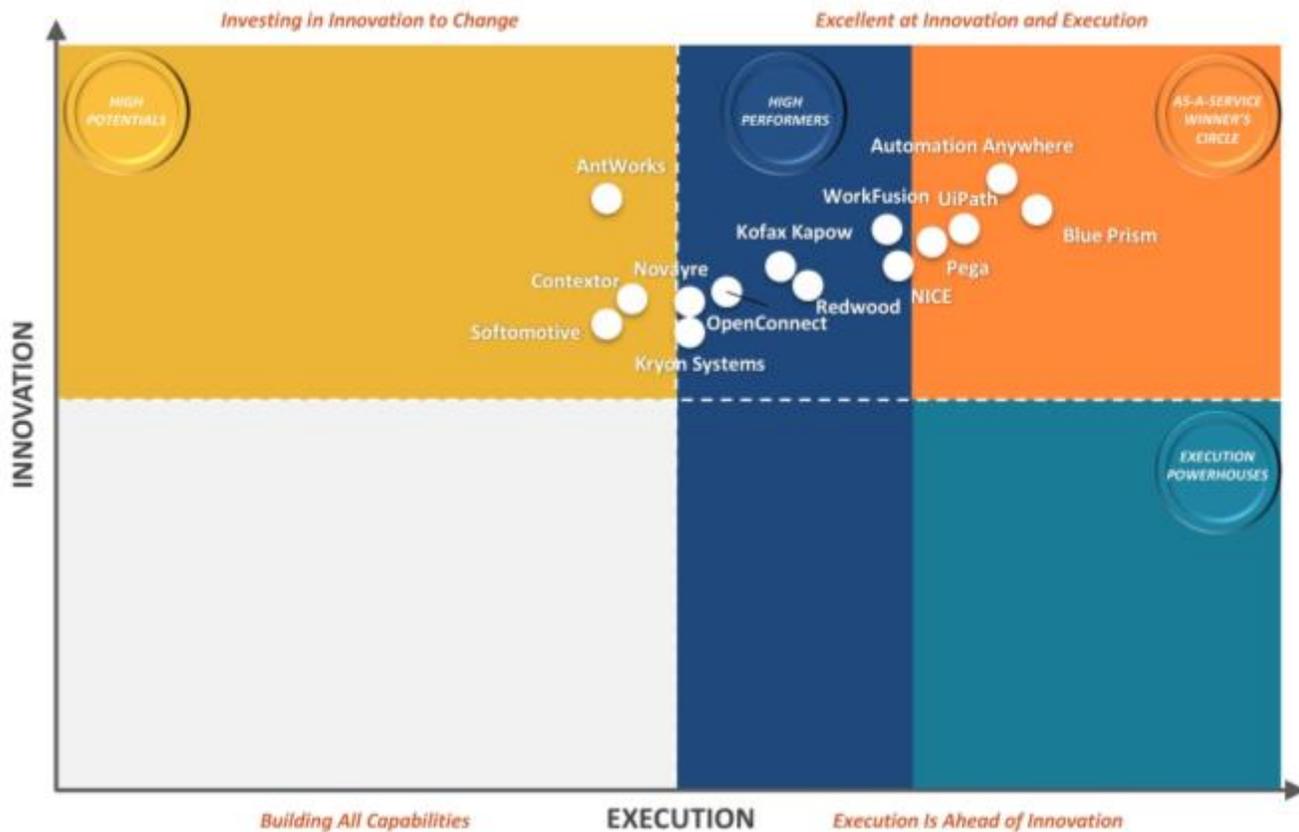
- Vision for and investments in the evolution of RPA
- Concrete roadmap to move up the Intelligent Automation Continuum
- Ability to integrate unstructured data
- Provision of operational analytics
- Object studio/library
- Control room/tower

By taking a partner and market-led approach, we are neither ignoring that service providers like Syntel, Cognizant, Infosys or TCS have proprietary RPA tools nor that the RDA players have a significant portion of direct sales. What we are trying to reflect in this Snapshot are the sourcing discussions for transforming mission-critical and back-office systems.

AutomationAnywhere and Blue Prism lead a nascent market

The companies in the Winner's Circle (AutomationAnywhere, Blue Prism, UiPath, and Pega) are the providers of choice for the channel partners focusing on transforming back-office processes. Behind this leading group, the positioning is becoming decidedly more blurred. Many of those deployments are rather pivoted to RDA or broader robotic capabilities, for instance, Redwood blending automation into ERP-centric services. However, at the same time providers like NICE, Contextor or Softomotive are adding RPA products to their existing RDA capabilities. The crucial point in understanding the differences between the providers in the Winner's Circle and their challengers is not a tick box exercise of adding functions and features, but capturing the evolving mindset toward helping partners better understand the implications of RPA technologies on process chains and workflows. Underpinned by effective change management, it is here where successful deployments will be decided.

Exhibit 2: The 2017 RPA tools set Blueprint Snapshot



Source: HfS Research 2017

The market is dominated by the “duopoly” of AutomationAnywhere and Blue Prism. AutomationAnywhere is strongest in F&A, offshore delivery centers, and the US market. As one executive quipped: “AutomationAnywhere has won the battle for Bangalore”. Conversely, Blue Prism is leveraging the first mover advantage with strong partner relationships, having the strongest impact on industry specific services, headquartered CoEs and the UK market.

Beyond those points AutomationAnywhere is aiming to differentiate around BotFarm, a cloud-based delivery to scale deployments and BotStore, a library of automation assets to leverage reuse. Their R&D investments focus on BotInsight (native, real-time RPA analytics), and IQ Bot (integrated cognitive solution), thus reinforcing the two broad directions of evolution for the RPA market around operational analytics and the broad bucket of cognitive to integrate unstructured data even in less well-defined processes. At the same time, AutomationAnywhere is aggressively scaling up its sales force to increase the reach in Europe in particular. Equally, it is investing strongly in training clients and partners which will



reinforce the partner ecosystem over time. AutomationAnywhere's roadmap and vision are pivoted to the speed of deployment, increasingly supported by cognitive capabilities such as IQ Bot. As with most providers in the Winner's Circle, the notion of the Digital Workforce has supplanted the earlier narrower notion of a turn-key solution.

In a market that is full of smoke and mirrors, Blue Prism is the dependable safe pair of hands. Customers opting for Blue Prism often aim to scale deployments and therefore are less focused on functions and features but the accumulated process knowledge within the provider organization. A good example for that is IBM's partnership with Blue Prism that is pragmatically focused to quickly scale and achieve efficiency gains. Blue Prism's strategic vision is to evolve toward an orchestration platform integrating a broad set of automation technologies. Behind the two market leaders, UiPath is growing strongly as clients cite the effective partnership culture and attractive commercial terms. Thus, for mature clients, UiPath is increasingly seen as the third strategic option in multi-vendor environments next to AutomationAnywhere and Blue Prism. This perception is enhanced by UiPath' vision to evolve into an automation ecosystem play, referenced by the integration of OpenSource cognitive libraries such as Google and Facebook. Pega's main value proposition is the quick deployment as well as the integration of both RDA and RPA in attended or un-attended scenarios. At the same time, Pega offers broader functionality by extending bots to its BPM suite. Pega's acquisition of OpenSpan is the template for how we expect the RPA market to evolve. Most of the providers will be acquired by larger ISVs with disparate value propositions. For buyers, this means planning for and trading off between broader capabilities and potentially higher licensing costs.

Outside the Winner's Circle, the most interesting provider in our view is AntWorks. Even though it is not even in the High Performers group as it is just starting to scale out, the holistic approach to automation and the compelling vision make AntWorks one of the most innovative providers in the market. The value proposition is about linking core RPA capabilities with machine reading including semi-structured content such as handwriting in forms as well as broader cognitive capabilities including pattern recognition, even in images. Furthermore, similar to providers like RAVN, AntWorks has Enterprise Search and Machine Learning functions to support extraction of data from legal documents. The combination of Computer Vision and pattern recognition allows AntWorks to provide one solution where many service providers have painstakingly integrated different tool sets. Around the broader cognitive capabilities, AntWorks is competing with IBM Watson which is another reference point for their holistic approach to automation. This vision of AntWorks is intrinsically aligned with HfS' notion of the Intelligent Automation Continuum. Suffice it to say, AntWorks is still early on their journey and therefore needs to demonstrate client references to the broader market.



The best way to think about the heterogeneous set of providers in the High Performers segment is to include them for specific use cases and requirements into the evaluation process. WorkFusion has strong capabilities on crowdsourcing and machine learning, yet lower level core RPA credentials and we are covering them in greater detail in the next chapter. NICE is the largest provider in the Blueprint Snapshot but its revenues come largely from a broad set of front office-centric solutions and services. In particular, desktop analytics to monitor agent activities is adding value to the broader RPA approach. Similar to Pega, NICE has a sweet spot in offering both attended and un-attended automation. While it has an expansive reseller channel, the certification and training for RPA functionalities are work in progress.

From the set of challengers only Novayre with its Jidoka solution is focused on core RPA. Quietly it has built out a solid traction in the Spanish-speaking world including Latin America. Novayre is similar to UiPath in leveraging Computer Vision with its Hawk EYE technology to provide strong capabilities in particular in Citrix environments. The key capabilities and positioning of the other challengers that we haven't mentioned yet include:

- » **Kofax Kapow** is evolving from front-office and broader data integration capabilities to a dedicated RPA offering, either as stand-alone RPA platform or be part of a larger Kofax platform solution based on Kofax TotalAgility (KTA) for solutions like new customer onboarding, claims processing, mortgage lending, patient services, and citizen services. Being acquired by Lexmark provides access to a broader corporate network, yet Lexmark is neither an ISV or service provider. Thus, we expect the value proposition to evolve into a more distinct positioning.
- » **OpenConnect** differentiates around operational analytics and through a vertical focus on healthcare and Financial Services.. While most RPA discussions and projects start with easy to secure process opportunities of lower complexity, OpenConnect is aiming first to identify and address the most complex processes because these tend to be the ones with the highest value. It achieves this via its WorkIQ suite that includes data collection, discovery, and analysis. These analytical tools allow organizations to automate processes leveraging the AutoIQ RPA solution. A key differentiation of OpenConnect's approach lies in the ability to analyze broad sets of data including deep data on a real-time basis. Furthermore, its server-based RPA tool sits on the network rather than the desktop as some of the competitive products do.
- » **Kryon Systems** is evolving from a strong focus on Computer Vision. Its Leo platform integrates pattern matching, neural network, and machine learning technologies as well as operational analytics. The company suggests it can automate any application without any integration. Kryon had been part of the early RPA through its partnership with HP. As it is expanding towards unattended automation, Kryon needs to demonstrate a stronger partner commitment.



- » **Softomotive** is evolving from productivity tools and RDA (WinAutomation) to the broader notion of RPA. The recently launched ProcessRobot offers core RPA capabilities as well as the integrated delivery of attended and un-attended automation. IBM provides a key partner relationship. To gain traction for ProcessRobot, their marketing and stakeholder management requires focus and investment.
- » **Contextor** is leveraging a strong presence in the French market. It is an established player in the RDA market and just recently expanded to RPA capabilities, offering both attended and unattended automation. Investments in marketing and stakeholder management for back-office requirements are critical.

Will WorkFusion’s “free RPA” move disrupt the market?

When WorkFusion announced a free RPA product dubbed “**RPA Express**” back in December, many executives in the automation community went pale. In defiance, and sometimes confusion, executives were quick to point out that WorkFusion does not have a “proper” enterprise grade RPA product. Therefore, the impact on the industry would be negligible as only the “proper” RPA providers would succeed. After the excitement calmed down, we are revisiting WorkFusion’s announcement to provide more clarity as to how the industry might evolve.

First of all, credit where credit is due: WorkFusion has one of the best, if not the best, marketing programs in the Intelligent Automation community. Back toward the end of 2015 WorkFusion joined the discussions as well as the conference circuit on Intelligent Automation with a **differentiating position around Crowdsourcing and Machine Learning**. Looking at the value proposition in more detail, WorkFusion breaks up complex processes into microtasks and delegates each task to either a machine tool (e.g., RPA, scrapers, OCR, text analytics) or a person depending on the complexity of the work. For tasks that require human judgment, the platform integrates internal employees, contingent workers, outsourced contract workers, and cloud workers. WorkFusion has APIs with global on-demand cloud talent markets, which is useful for increasing scale and language coverage for human tasks. Fast forward 12 months and WorkFusion has now successfully created the perception of being one of the leading RPA tools providers. They understood better than most people that in an undefined market it is all about getting access to the sourcing decisions on automation.

Thus, WorkFusion has been successful in scaling up the sales of their Smart Process Automation (SPA) product that has extended the capabilities to Tableau-based analytics and to cognitive tools allowing for automating judgement work on unstructured data. Similarly, within its object library, WorkFusion can drag



and drop entire processes (e.g., “KYC,” “corporate actions,” “OCR”). By taking an end-to-end process view, WorkFusion is aligned with the shift toward transformational projects and evolving along the Intelligent Automation Continuum. Therefore, buyers see WorkFusion as differentiating option adjacent to core RPA tool sets. However, condensing the perspective to a narrow RPA discussion, the picture flips slightly. The feedback from stakeholders is that WorkFusion got selected for core RPA projects only in a handful of occasions. One of the reasons is said to be that the company is leveraging lower level tools like AutoIT and Selenium, which require a significant amount of coding to make deployments work. Equally, the capabilities of RPA Express (Bot Recorder, Developer Studio, UI Automation Drivers, Bot Libraries, Scheduling, Control Tower, User/Role Management) are pretty much offered by all competitors. Therefore, the focus is probably on accelerating the customer acquisition for its broader SPA offering rather than RPA, but equally the progress toward higher value services.

The discussions with stakeholders on the implications of the announcement raised a lot of valuable points to consider when assessing whether this will lead to disruption or not. A compelling argument is that OpenSource has thus far not lead to any disruption in the industry. But what is probably more important is that licensing cost account for a fraction of RPA projects only. Suggestions for implementation costs ranging from 5 to 10 times that of the RPA license. Extending that thought, one stakeholder provided the analogy of wanting to build a house. Just by assembling the building materials one is unlikely to be able to build a house. The secret sauce and value-add are in understanding the impact of innovative technologies on the process chains and workflows. It is here where the core RPA providers are standing out.

Thus, there is a consensus among the RPA community that there is unlikely to be a disruption from WorkFusion’s announcement. However, we have cautioned that the announcement could negatively impact valuations for M&A activities as the suggestion of commodity RPA could raise concern among investors. Lastly, the move has also heightened the discussions on what RPA is really meant to be. Yet, as nothing is defined, it is not just a tick box exercise of functions and features. Rather it is the demonstration of having enabled process transformation with an end-to-end mindset, where considerations of data curation at the beginning of a project is increasingly coming to the fore. As we have quipped repeatedly, RPA is dead!! Long live Intelligent Automation!!

Gazing into the crystal ball: RPA in 2017 and beyond

Against the background of an increasingly maturing automation and RPA ecosystem, where successful deployments are being enabled through an end-to-end process view and a transformational mindset, what are the scenarios that HfS Research is seeing over the next year and beyond?



- » **RPA will remain undefined.** Over the next 12 months, the perception of RPA will remain blurred. RPA capabilities will fold into broad propositions such as Digital Workforces or Cognitive Automation. This is adding to the continuing confusion around RPA. Extending on that, in 18 months we won't talk about RPA anymore. Most of the leading technology providers will have been acquired and RPA is a reality in the back-office.
- » **M&A through ISVs.** Buyers will have to do scenario planning for acquisitions. While this might bring broader capabilities, licensing costs are likely to increase as well. Pega's acquisition of OpenSpan is the template for such developments. Beyond the tool providers, the automation pure plays such as Symphony and GenFour are likely to be equally absorbed by larger consultancies.
- » **The emergence of an Automation Ecosystem:** We already have seen the impact of Watson, as it is starting to evolve into an ecosystem. Suffice it to say, IBM could be the driving force to extend those capabilities, as we have argued some time ago. But it could equally be one of the tool providers significantly expanding its reach. As stated, we are seeing the providers in the Winner's Circle moving toward the notion of orchestrating much broader automation capabilities. At the same time, we are seeing providers like Blue Prism and UiPath being deployed in IT-centric scenarios such as IT Help Desk and Application Management, pointing to a convergence of scenarios and tool sets.
- » **Change management will finally take center stage.** RPA is largely horizontal, but as organizations are starting to move toward the notion of the Digital OneOffice, traditional silos have to be overcome. This is largely the turf for management consultancies and service providers. We have seen UiPath talking about wanting to develop industry templates just to get headwinds from their partner ecosystem deeming that their prerogative. However, it is crucial for the perspective for change management to focus in two directions. First, helping organizations to move toward the As-a-Service-Economy. And second, focusing on service delivery along the Continuum of Intelligent Automation.
- » **A new set of data-centric partnerships.** To build out cognitive and AI capabilities and to optimize the engines, access to data is critical. As many customers remain coy giving provider access, we might see a new set of partnerships accelerating these capabilities. While it might sound trite, data really is the new currency. Obviously, these scenarios might overlap. Equally, M&A is often not rational. Thus, I am sure the market will continue to spring many surprises on us.

About the Author

Tom Reuner



Tom Reuner is Senior Vice President, Intelligent Automation and IT Services at HfS. Tom is responsible for driving the HfS research agenda for Intelligent Automation and IT Services. Automation cuts across the whole gamut ranging from RPA to Autonomics to Cognitive Computing and Artificial Intelligence. This includes increasingly the intersections of unstructured data, analytics, and Cognitive Automation while mobilizing the HfS analysts to research Intelligent Automation dynamics across specific industries and business functions. Furthermore, he is supporting HfS' push to disrupt IT Services research by focusing on application services and testing. A central theme for all 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.

He lives in London with his wife and in his spare time, he is trying to improve his culinary skills in order to distract him from the straining experience of being a Spurs supporter.

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