



HFS Horizons Report

Services for the Platform Economy, 2023

Covering the leading service providers catering to born-digital platform businesses

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Excerpt for Accenture



The ascendancy of the platform economy ushers in a transformative era in the enterprise world—six of the world’s top 10 companies by market capitalization are now platform businesses. This dynamic shift redefines traditional business boundaries, compelling the market to embrace eco-system-driven opportunities, multi-sided customer lifecycles, and manage hypergrowth phases. Service providers are pivotal in fostering this growth and innovation by sharing and managing critical business and IT activities of their platform clients.

Ashish Chaturvedi, Practice Leader

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Introduction and the HFS view of the platform economy

Introduction

Born-digital tech companies that provide a platform for multiple businesses or individuals to trade or engage with consumers are called **platform businesses**. Uber, Netflix, Amazon, Facebook, Google, and Spotify are all platform businesses. A platform is often associated with a business ecosystem, and the members of the ecosystem have access to the platform's capabilities and functionalities. The last decade has seen the ascendancy of such businesses. These businesses have changed how consumers and producers interact, how companies compete (customer acquisition becoming more important than profits), and how value is created in the economy. These platform companies with new rules of engagement, reimagined value chains, and non-conventional business models constitute the **platform economy**.

The platform economy has become an irresistible customer segment for IT and business process services (BPS) providers. However, few providers have been able to crack the code required to work with platform businesses. This report looks at covering a few notable providers catering to the platform economy.

HFS Horizons Report: Services for the platform economy, 2023 assesses how well service providers are helping their **platform clients efficiently run their operations, expand their business, and realize value**.

- **Horizon 1: Specialists** catering to specific aspects of a platform business such as digital engineering or digital marketing, leading to functional outcomes in terms of cost, speed-to-market, or revenue. For example, providers only in digital marketing or digital engineering or M&A consulting would feature under Horizon 1
- **Horizon 2: Experts** with Horizon 1 attributes plus a diverse portfolio of services and core competence in working with platform clients with varying business models and deep partnerships; for example, a provider offering revenue operations (revops), digital engineering, content management, or contact center services with a substantial set of customers along with partners directly involved in those services.
- **Horizon 3: Leaders** with Horizon 2 attributes plus an innovative portfolio of tailored services and instances of co-innovation driving completely new sources of value with HFS OneEcosystem™ approach. IPO readiness, content moderation, and multi-sided client onboarding are examples of tailored services. An example of co-innovation would be a provider working with a platform company on LLM initiatives.

This study evaluates the capabilities of **seven** providers across the [HFS value chain—services for the platform economy](#), based on a range of dimensions to understand the **Why, What, How, and So What** of their service offerings.

This report highlights the **value-based positioning** for each participant across the three distinct horizons. It also includes **detailed service provider profiles**, outlining **business facts, strengths, and development opportunities**.

The scope of the services for the platform economy Horizons study

Envisage platform economy as an industry vertical

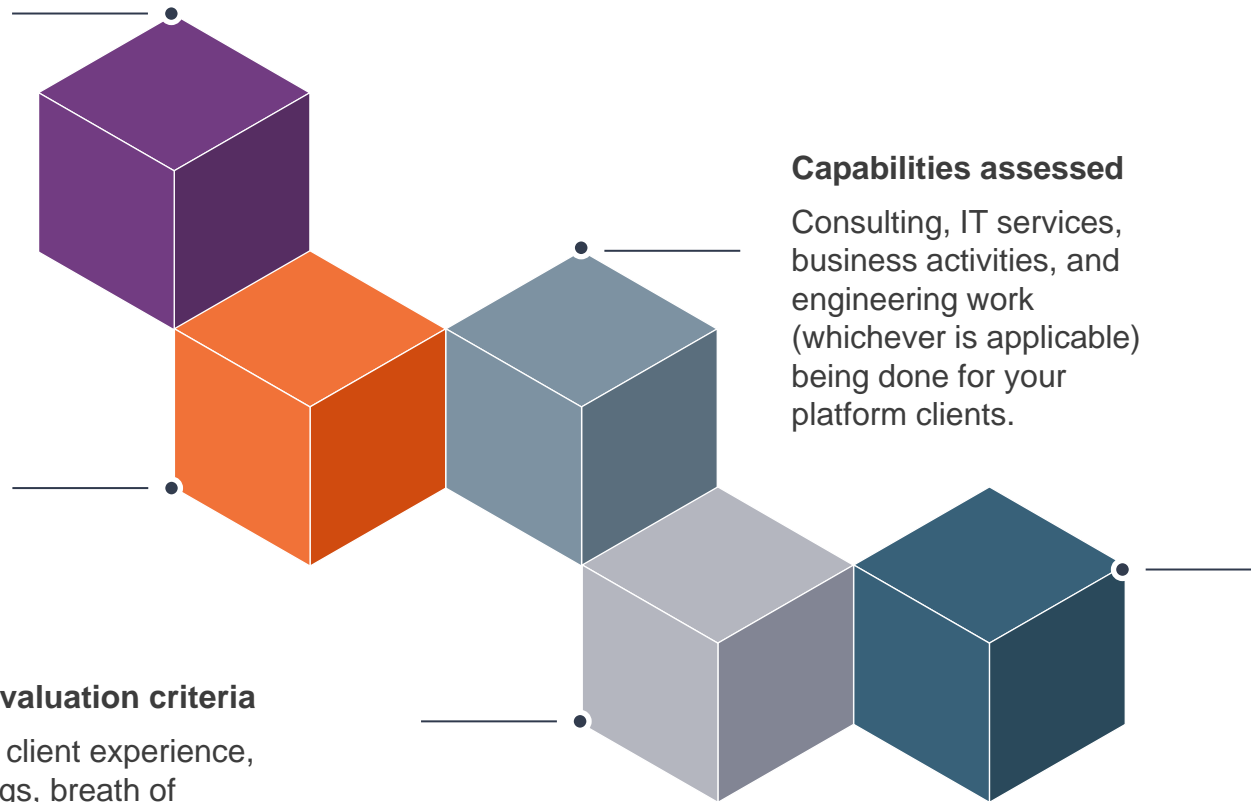
Consider all your platform clients across industry segments and treat the pack as a single industry. Then, figure out all the services you provide them across the [HFS value chain—services for the platform economy](#).

Client segments to consider

High-tech, ed-tech, fintech, social media, marketplaces, ecommerce, ride sharing, OTT streaming companies, travel tech, food/grocery/goods delivery platforms, health tech.

Noteworthy evaluation criteria

Multi-segment client experience, tailored offerings, breath of (applicable) services, business impact, co-innovation examples, and business affinity.



HFS Horizons, services for the platform economy, 2023—aligning enterprise objectives with service provider value



Eco-system competence and tailored offerings are Horizon 3 (Leaders)

Horizon 3 providers demonstrate

Horizon 2+

- An established practice or business unit for the platform economy
- Tailored offerings for platform businesses such as IPO readiness
- Devise offerings considering unique characteristics of platform businesses like network effects, multi-sided clientele, ecosystem play
- Deep understanding of the platform economy model
- Finding new sources of value for the platform businesses through co-innovation and joint partnerships

Experience is Horizon 2 (Experts)

Horizon 2 providers demonstrate

Horizon 1+

- An array of offerings spanning the platform-based business model
- Specialized, trained, and skilled talent with domain expertise
- Experience working with multi-industry varied platform businesses (ed-tech, high-tech, fintech, social media, search engines, holiday rentals, subscription services)
- Quantifiable financial and customer experience-related benefits delivered

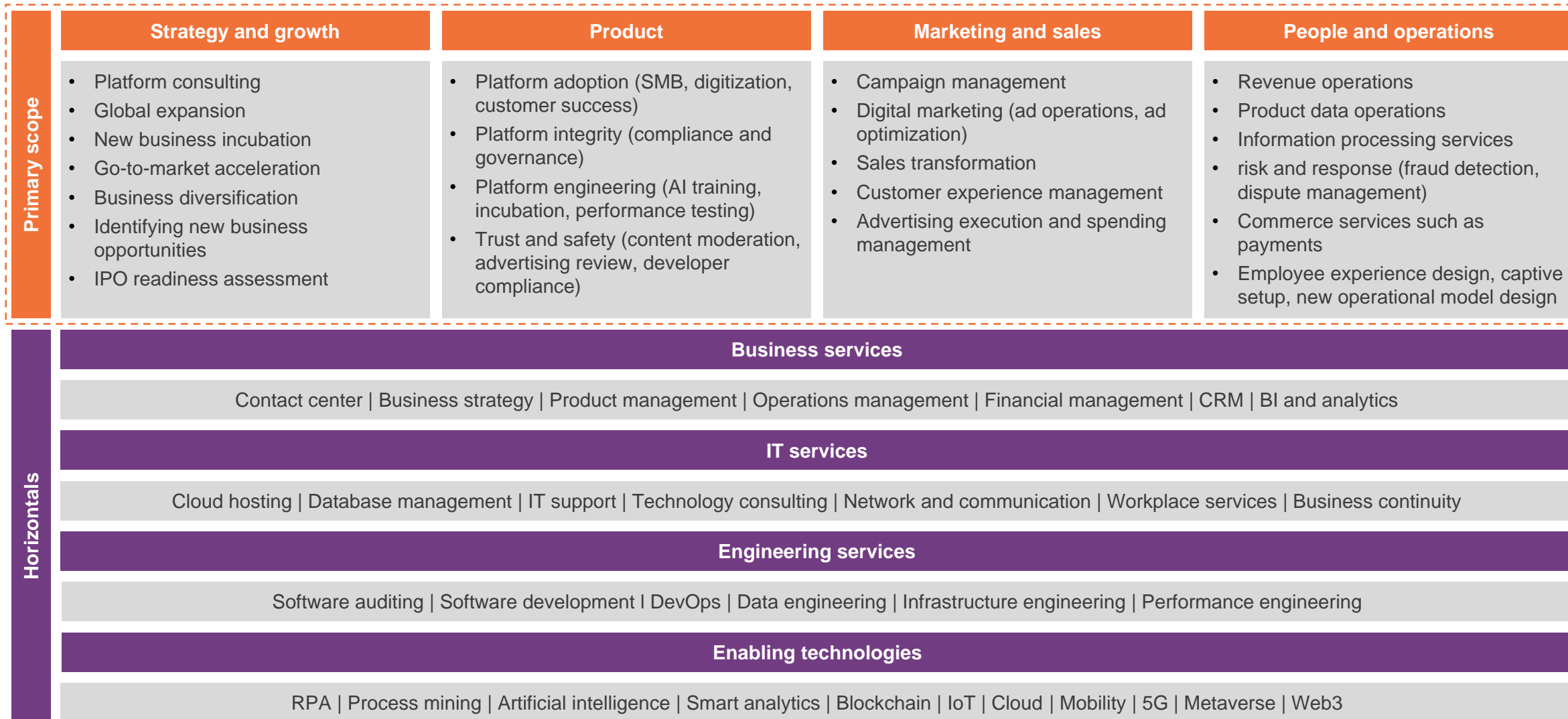
Niche capabilities is Horizon 1 (Specialists)

Horizon 1 providers demonstrate

- Offers niche and specialized services catering to specific aspects of a platform business; for example, engineering services.
- A project-based execution approach
- Outcomes delivered in terms of speed-to-market or cost reduction
- The purpose of engagement can be missing capability or resource deficit

Note: All service providers within a "Horizon" are listed alphabetically

HFS value chain—services for the platform economy, from strategy and growth to people and operations



The HFS value chain—services for the platform economy, explained

HFS formulated the coverage of services for the platform economy to graphically depict our understanding of the processes and functions that the platform economy engages in to operate their businesses.

The primary scope items include the following:

- **Strategy and growth:** Organizational level consulting services leveraged by platform businesses to grow their market share and customer base, identify new business areas, improve their go-to-market strategy, and expand to other geographies.
- **Product:** Comprises services directly supporting the core business—the platform itself. It ranges from platform adoption (identifying and engaging with the ecosystem players required for a successful multi-sided platform) to platform compliance (helping the platform business comply with convoluted regulations).
- **Marketing and sales:** These include services that can accelerate the adoption of products and services sold through the platform. For example, campaign management for a travel tech company to target selective tourists.
- **People and operations:** These include services to streamline, automate, and efficiently run day-to-day business processes along with enhancing the overall employee experience.

The horizontals include various business, IT, engineering, consulting, and emerging tech capabilities required to deliver the aforementioned primary services.

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Executive summary and market dynamics

Executive summary

1 What's happening?

- The enterprise world is getting platformized. Currently, six of the top 10 global businesses by market capitalization are platform businesses and 125 among the top 500 US stocks are again platform businesses. These companies are ruling the roost not just in market share but also in terms of technological advancements. For example, many of the leading platform companies like Amazon.com or Meta have been working on and incorporating recently introduced technologies such as LLM and generative AI for the past few years. The platform companies, especially start-ups and next-generation platform businesses, are constantly looking for providers that can respond to their platform's network effects, understand the multi-sided nature of clients (providers and consumers), play the role of an orchestrator in ecosystem building, show preparedness to handle rapid scaling, and help in geographic expansion.

2 Key observations

- **Providers are still finding their footing.** Providers, barring Accenture, don't have a dedicated business unit or practice for the platform businesses. In most provider organizations, the platform clients are segregated based on industry verticals. For example, if it's Uber, the travel, transportation, and leisure vertical in the provider organization would be handling that account. Similarly, if it's Amazon.com, then the retail and CPG practice would manage it.
- **The typical deal size is sub-50 million.** As platform businesses are born digital firms, providers don't win large legacy modernization and transformation projects. For instance, the probability of Walmart outsourcing \$500 million is much higher than Amazon.com because of the underlying business model, legacy infrastructure, and physical footprint.
- **Platform players are inward.** Platform companies like keeping services in-house, both business and tech functions, to stay competitive. While many platform companies in the hyper-growth phase grow at a phenomenal rate, experiencing 10X to 100X growth, that doesn't translate to a similar growth on the provider side. Regardless, all seven providers evaluated in this study have been witnessing high double-digit growth from platform clients for the past few years.
- **Platform players are also very selective.** The seven players evaluated for the study generated more than \$13 billion in annual revenue from about 979 platform clients (with overlaps). Interestingly, many other tier-1 and tier-2 vendors initially considered for the study don't even generate 5% of their overall revenue from the platform economy and/or have less than 12 platform businesses clients. It points to the fact that platform companies are selective in choosing their partners.

3 Services for the platform economy—the winners revealed

- **HFS assessed seven leading service providers providing services to the platform economy.** Of these seven providers, three are positioned in Horizon 3 as leaders, three in Horizon 2 as experts, and one in Horizon 1 as a specialist. The services firms that lead the market and ecosystem-level change in Horizon 3 are **Accenture, Cognizant, and Teleperformance**. The services providers with rich client experience and a wide array of offerings in Horizon 2 are **TaskUs, TCS, and WNS**. The services firm providing specialized and niche services in Horizon 1 is **Globant**.

4 Voice of Customers and Partners

- The most outsourced activities are customer experience management, content management, trust and safety, platform adoption (SMB, digitization, customer success, and platform integrity (compliance and governance)).
- Service providers are actively leveraging analytics and cloud offerings in their engagements with platform clients.

Platform businesses differ from traditional businesses in a few key aspects



Network effect

The value of a platform is directly proportional to the number of users joining and engaging on the platform. As more users join, the service design need to evolve accordingly while maintaining or elevating the delivery quality.



Multi-sided customers

Typically, platform businesses connect two distinct groups. For example, Airbnb connects vacation home providers and users. Therefore, two separate but parallel customer lifecycles need to be considered while devising various business and IT services.



Compounding marketplace dynamics

As both sellers and buyers or creators and consumers are part of the platform, there's a greater degree of complexity involved in maintaining the supply demand balance. Services such as dynamic pricing mechanisms or ensuring effective transactions or dispute management become critical.



Data-driven decision making

Many platform businesses generate vast amount of data. For example, Facebook generates more than four petabytes of data daily. This data plays a crucial role in user engagement, pricing the platform offerings, and personalizing services.



Partner and eco-system management

Platform businesses often have a vast ecosystem of partners (e.g., content creators) and individuals (e.g., third-party developers) compared to traditional businesses. Therefore, the requirement of an ecosystem integrator or orchestrator is high.



Scaling at speed

During the hypergrowth phase, platform businesses exponentially acquire customers and are looking to scale rapidly to new geographies. Here, the pace of change is multifold compared to traditional businesses.

The key forces shaping the platform economy, from emerging technologies to financial challenges and strategic pressures

Generative AI is the flavor of the season

Platform businesses are engaged in the game of one-upmanship regarding generative AI. Ecommerce companies like Amazon.com are leveraging large language models to improve product recommendations, CX, and inventory management. Whereas social media firms like Meta are building their own generative AI models to analyze user content, personalize news feeds, and improve user recommendations.

Financial contagion and downsizing turbulence

The rapid collapse of SVB, a prominent player fuelling hypergrowth companies, poses risks of financial contagion that could adversely impact the platform economy. This collapse has coincided with significant layoffs and downsizing within platform companies, creating turbulence across the sector—300K+ tech employees have been laid off in the past year.

Cost containment has become a priority

For a change, platform companies are prioritizing cost containment, taking decisive actions to strengthen their organizations, and ride out a potentially long economic downturn. The founders and management are facing pressure from investors to enhance operating efficiency and make strategic decisions with rigor, addressing both technological advancements and cost management.

Diversifying to stay afloat

In the quest for greater market share, platform companies are expanding their service offerings beyond the core service. For example, ride-hailing platforms are branching out into food delivery, grocery delivery, and other on-demand services.

Increased collaboration with traditional businesses

Platform businesses are increasingly collaborating with traditional industries to leverage their expertise, resources, and distribution networks. For example, e-commerce platforms partnering with brick-and-mortar retailers for last-mile delivery or click-and-collect services.

Increased competition

There is a new unicorn being built every day in key platform verticals including fintech, health tech, social media, ed tech, high-tech, and sharing economy, coercing existing players to continually innovate introducing new products and services along with geographic expansion.

How are providers fulfilling the platform economy demands?

Where are platform players seeking help?

- In the early stages, most platform companies solely focus on customer acquisition, and the operations are mostly unstructured with a limited workforce—as the company expands, there's the basic need felt to attain operational efficiency
- Consulting on M&A targets, IPO filings, rules and regulations, platform roadmap, and strategic bets are important growth drivers
- Retain customers, employees, and partners while striving to enhance their experience
- Solve day-to-day operational bottlenecks
- Improve brand advocacy, reach, and engagement
- Maintain trust, safety, and compliance
- Manage and harness data and information while complying with various standards
- Devise new sales and marketing strategies and campaign management
- Handling disputes, fraud detection, and resolutions
- Managing various partners and vendors
- Collaboration on platform management or enhancement

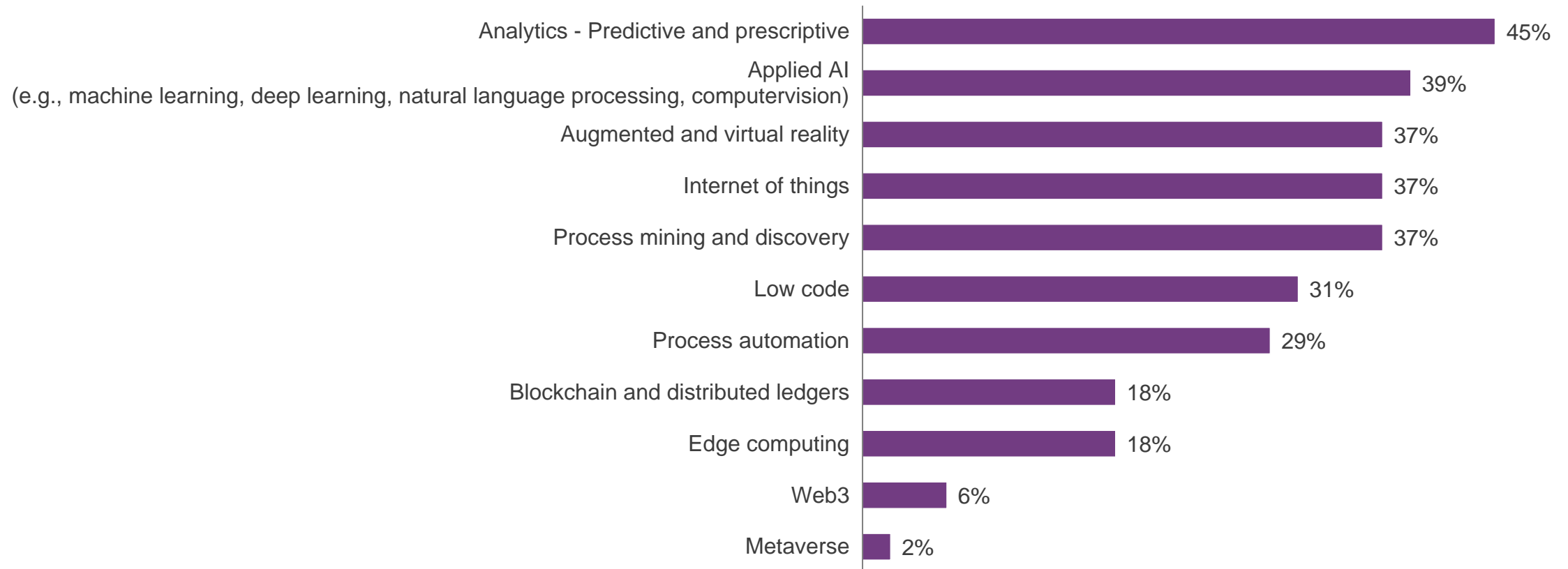


How are providers resonating?

- Revops and cost-focused services
- Content moderation and other compliance services
- Business consulting services such as IPO readiness assessment
- Platform adoption and strategy
- Platform engineering services
- Campaign management
- Customer experience management and lifecycle management
- Eco-system orchestrator or integrator role
- Geographic expansion and language support
- Digitizing custom-facing processes—for example, reducing customer onboarding time for fintechs
- Partner and supplier onboarding and management
- Information processing services
- Sales transformation and digital marketing
- Enhanced reach and engagement
- Provide continuous business analysis to proactively detect digital value opportunities

Providers are extensively incorporating analytics and applied AI in their services offerings

Please specify which enabling technologies your service provider is leveraging as part of your relationship.



Sample: 51 technology clients
Source: HFS Pulse, 2023

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Research methodology

Service providers covered in this report



Note: All service providers are listed alphabetically

Sources of data

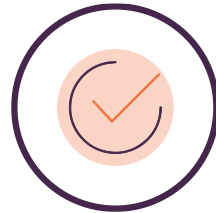
This report relied on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on service providers working with the platform economy. Sources are as follows:



Briefings and supporting information

HFS conducted detailed **briefings** with leadership from each provider.

Each participant submitted a specific set of **supporting information** aligned to the assessment methodology.



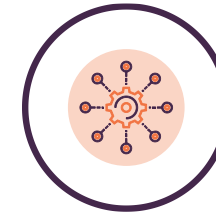
Reference checks

We conducted detailed reference surveys and interviews with selective **active clients and ecosystem partners** of the study participants.



HFS vendor ratings

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions. For this study, we leveraged our fresh data from the field via the HFS Pulse Study in Q1 2023 featuring **approximately 51 service provider ratings from technology enterprises.**



Other data sources

Public information such as press releases and websites.

Ongoing interactions, briefings, virtual events, etc., with in-scope vendors and their clients and partners.

Horizons assessment methodology—services for the platform economy

The “*HFS Horizons – Services for the Platform Economy*” research evaluates the capabilities of service providers across a range of dimensions to understand the *why, what, how, and so what* of their service offerings. Our assessment is based on inputs from clients and partners, augmented with analyst perspectives. The following illustrates how we assessed provider capabilities:

		← Distinguishing supplier characteristics →		
Assessment Dimension (weightage)	Description	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
Value proposition: The Why? (25%)	Strategy and vision for platform businesses	<ul style="list-style-type: none"> Specialization in niche areas such as digital platform engineering or digital marketing 	<ul style="list-style-type: none"> Horizon 1 + Deep industry experience and broad product portfolio 	<ul style="list-style-type: none"> Horizon 2 + Tailored offerings, established business practice and co-innovation to identify new sources of value
	Offerings aligned to top problem statements for this business segment			
	Competitive differentiators			
Execution and innovation capabilities: The What? (25%)	Breadth and depth of services for platform businesses	<ul style="list-style-type: none"> Strong areas of excellence Primarily focused on either technology services or business services Offshore-focused with strong technical skills emerging ecosystem of partners Adequate coverage across platform business' value chain 	<ul style="list-style-type: none"> Horizon 1 + Ability to support clients on their end-to-end transformation journey Global delivery presence Well-rounded capabilities across all value creation levers: talent, domain, technology, data, sustainability, and change management Platform business-specific partnerships 	<ul style="list-style-type: none"> Horizon 2+ Strategy and execution capabilities at scale IT and Business services capabilities with strong consulting skills Ability to influence systemic change across the global platform context Robust ecosystem of partners integrated into the offerings Differentiated IP, frameworks, and technology assets
	New and differentiated offerings			
	Sustainability strategy, narrative, ambition, and percentage of engagements involving sustainability goals and outcomes			
	Strength of ecosystem (depth and breadth of partnerships)			
	Strength of talent pool (delivery centers, experience, certifications, training program)			
	Technology innovation (use cases and level adoption of emerging technology)			
	Intellectual property and proprietary frameworks			
Go-to-market strategy: The How? (25%)	Nature of investments (M&A, R&D, others)	<ul style="list-style-type: none"> Clearly defined go-to-market strategy Mainly effort-driven client relationships Project-based relationship 	<ul style="list-style-type: none"> Horizon 1 + Ability to bring together all capabilities of the organization in an easy-to-understand and simple-to-consume way Platform businesses specific investments Outcome-driven client relationships 	<ul style="list-style-type: none"> Horizon 2+ Market-leading internal and external investments Driving co-creation with clients and partner ecosystem Purpose-led relationships driving growth and innovation for clients
	Co-creation with customers and co-development with partners			
	Innovative commercial structures			
Market impact: The So What? (25%)	Scale and growth of services (customers, revenue)	<ul style="list-style-type: none"> Referenceable and satisfied clients Strong execution credentials Primarily a vendor-client relationship 	<ul style="list-style-type: none"> Horizon 1+ Referenceable and satisfied clients for their ability to innovate and execute Strategic partners 	<ul style="list-style-type: none"> Horizon 2 + Referenceable and satisfied clients driving new business models Perceived as a thought leader
	Demonstrable client case studies (multi-industry, magnitude, nature of outcomes)			
	Voice of the customer			

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Horizons results: Services for the platform economy, 2023

The revenue growth for service providers far exceeds the headcount growth, indicating increased use of automation in engagements with platform firms

The consolidated statistics of the seven service providers in this study

\$13.5 billion

Total dedicated services revenue from the platform economy



27%

Annual revenue growth in 2022



\$13.7 million

Annual revenue generated per client



263,200

Total aligned headcount



17%

Annual headcount growth in 2022



9.2 CSAT

Average customer ratings of service providers



979

Total number of platform clients



16%

Annual client growth in 2022



9.2 CSAT

Average partner ratings of service providers



HFS Horizons—a summary of service providers assessed in this report

Providers (alphabetical order)	HFS point of view
Accenture	A dedicated business practice with tailored and unique offerings for platform businesses makes it stand out from the pack
Cognizant	Strategic partner to leading digital platform companies helping them engineer their modern businesses
Globant	Pure-play digital engineering firm with a recurring blue-chip customer base of platform companies
TaskUs	Apt in delivering quick outcomes relying on an agile mindset, context-sensitive tooling, and quick talent deployment skills
TCS	Advisory-led approach, deep domain cross-industry knowledge and global footprint makes it an apt choice for delivering high-value work
Teleperformance	Apt in scaling talent, finding new opportunities, and serving platform clients globally in multiple languages and markets
WNS	Domain and analytics-led services with flexible commercial models make it a suitable choice for business operations outsourcing

HFS Horizons—Services for the platform economy, 2023



Eco-system competence and tailored offerings is Horizon 3 (Leaders)

Horizon 3 providers demonstrate

Horizon 2+

- An established practice or BU for the platform economy
- Tailored offerings for platform businesses
- Deep understanding of the platform economy model
- Finding new sources of value for the platform businesses through co-innovation and joint partnerships

Experience is Horizon 2 (Experts)

Horizon 2 providers demonstrate

Horizon 1+

- An array of offerings spanning the Platform-based business model
- Specialized, trained and skilled talent with domain expertise
- Experience working with multi-industry varied platform businesses (ed-tech, hi-tech, fintech, social media, search engines, holiday rentals, subscription services)
- Quantifiable financial and customer experience-related benefits delivered

Niche Capabilities is Horizon 1 (Specialists)

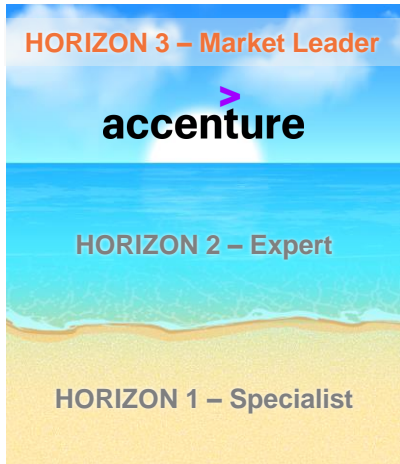
Horizon 1 providers demonstrate

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Accenture profile: Services for the platform economy, 2023

Accenture: A dedicated business practice with tailored and unique offerings for platform businesses makes it stand out from the pack



Strengths	Development opportunities
<ul style="list-style-type: none"> • Value proposition: Early-mover advantage, tailored offerings, an agile mindset, and management consulting chops help Accenture address platform clients’ challenges and discover opportunities across the value chain. • Key offerings: Platform strategy (data-driven market analysis, competitive analysis, international expansion, ecosystem planning, M&A, and transformation); platform engineering (formulating product and data services); platform adoption (identifying, attracting, and engaging multi-sided clients); platform integrity (trust and safety, operational integrity, platform security, and platform enablement); IPO readiness, large language models (LLM), and generative AI solutions. • Growth proof points: Software and platforms practice witnessed an annual topline growth of 28%, works with the global top 10 platform businesses, and supports over 100 million end users via Accenture customer care. • Key differentiators: Accenture supports platform businesses in more than 30 countries and 70 languages. • Outcomes: Significant revenue contribution from ecosystem partnerships; helped 10 unicorn clients expand into 15 global markets; its top 30 unicorn clients have raised tens of billions of dollars in VC funding supported by Accenture’s investment strategy work. • Employee kudos: Employees ranked Accenture number one for “intention to stay with the employer” in HFS’ Super Seven Services Employers 2023 study. • Customer and partner kudos: Clients applauded Accenture’s global presence and readiness to collaborate on different business initiatives. 	<ul style="list-style-type: none"> • What we’d like to see more of: Accenture has been working on emerging tech like large language models (LLMs) for the past few years with some of the key clients. It needs to continue its efforts in finding industry-specific generative AI use cases to maintain its first-mover advantage. • What we’d like to see less of: Accenture’s offerings coverage is excellent; however, the commercial engagement models still follow a conventional and effort-based approach. • Employee critiques: It rated low on employee net promoter score in HFS’ Super Seven Services Employers 2023 study. • Customer and partner critiques: It has too many client touchpoints that sometimes lead to delays in decision-making.

Relevant M&A and partnerships	Key platform clients	Global operations and resources	Flagship internal IP—platform economy
<p>Acquisitions (2019–2023)</p> <ul style="list-style-type: none"> • Around 20 acquisitions positively impacted Accenture’s S&P practice. • These include Droga5, N3, Deja vu Security, umlaut, Bow & Arrow, Romp, Yesler, Xoomworks, Root Inc, eLogic, AlphaBeta Advisors, Sentia, End-to-End Analytics, The Beacon Group, Workforce Insight, Trancom ITS (engg capabilities), Nytec Inc., Adaptly, DI Square (consulting capabilities). <p>Partnerships</p> <ul style="list-style-type: none"> • 275 tech and business partners supporting engagements with platform businesses • Major partners include AWS, Cisco, Google, HPE, Microsoft, Oracle, Pivotal, Red Hat, Salesforce, SAP, ServiceNow, and VMware. 	<p>Number of platform clients: 140</p> <p>Key clients</p> <ul style="list-style-type: none"> • A leading social media platform • Large e-commerce marketplace • A leading payments services platform • Leading online marketplace for stay experiences • Leading digital music subscription provider • A global survey platform 	<p>Headcount: 50,000</p> <p>Delivery and innovation locations</p> <p>Over 50 delivery centers are distributed across North and South America, EMEA and APAC.</p> <ul style="list-style-type: none"> • These support strategy and consulting, interactive, technology and operations 	<ul style="list-style-type: none"> • 70+ assets support S&P clients • SynOps – Data and Insights platform • Advance Customer Engagement (ACE+) – Improve the customer journey through proactive messaging and digitizing personal experiences • Intelligent revenue growth (IRG) – Unlocks customer revenue through AI-powered personalization and customer targeting

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HFS Research author

HFS Research author



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Ashish Chaturvedi is a Practice Leader at HFS covering supply chain, retail & CPG, platform economy, and disruptive technologies. Ashish is an accomplished IT industry analyst and a member of RetailWire BrainTrust and IDG Influencer Network. With over 13 years of technology research experience, Ashish has authored more than 70 research reports spanning platform economy, retail technologies, enterprise modernization, low-code/no-code development, digital benchmarking, and IT sourcing.

Over the years, Ashish has advised several senior executives on digital strategy, product/service planning, next-gen technologies, and IT procurement. He has delivered several multidisciplinary research engagements including provider and market intelligence reports, go-to-market workshops, white papers, podcasts, and research-based advisory.



About HFS

Insight. Inspiration. Impact.

HFS is a unique analyst organization that combines deep visionary expertise with rapid demand-side analysis of the Global 2000. Its outlook for the future is admired across the global technology and business operations industries. Its analysts are respected for their no-nonsense insights based on demand-side data and engagements with industry practitioners.

HFS Research introduced the world to terms such as “RPA” (Robotic Process Automation) in 2012 and more recently, Digital OneOffice™, OneEcosystem™ and Generative Enterprise™. The HFS mission is to provide visionary insight into the major innovations impacting business operations such as Automation and Process Intelligence, Blockchain, the Metaverse and Web3. HFS has deep business practices across all key industries, IT and business services, sustainability and engineering.

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