



HFS Horizons Report

# Travel, Hospitality, and Logistics Service Providers, 2023

An assessment of travel, hospitality, and logistics service providers,  
addressing “Why, What, How, and So What”

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Excerpt for Sutherland

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Today’s travel, hospitality, and logistics enterprises are just emerging from the perfect storm the pandemic created. Leaders are challenged by multiple factors, not least of which are labor shortages, an ongoing war in Europe, inflation, and sustainability concerns. They also see glimmers of optimism for industry revival, with “revenge travel” trends picking up in 2021–2022 and business travel set to resurge this year, with companies returning to in-person meetings and relationship building. They are challenged by the digital dichotomy—hunkering down and focusing on efficiencies to contain costs while simultaneously speeding up innovation to elevate experiences and create differentiation. This necessitates a strong ecosystem to manage change and disruption.

Melissa O’Brien, Executive Research Leader

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The THL industry is transforming into what we can refer to as THL 2.0. Post-COVID, the industry has adopted newer technologies, including AI, IoT, cloud, robotics, AR/VR, and metaverse, which can serve changing customer expectations and provide a better experience. The industry is innovating with solutions catering to the environment, safety, and sustainability.

Mayank Madhur, Associate Practice Leader

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# 1

## Introduction and the HFS value chain

# Introduction

- The travel, hospitality, and logistics (THL) industry has always been an important part of the global economy, contributing significantly to job creation and GDP. However, the COVID-19 pandemic brought unprecedented challenges to this industry, disrupting supply chains, closing borders, and forcing businesses to adapt to the new reality of social distancing and remote work. As a result, the industry has had to quickly adopt digital technologies to survive and thrive in this new landscape.
- The **HFS Horizons: Travel, Hospitality, and Logistics Service Providers, 2023** report assesses the current state of the THL industries and analyzes how service providers are contributing to the digital transformation of various sub-industries such as airlines, airports, hotels, casinos, and more.
- We assessed and rated the THL service capabilities of 21 service providers across dimensions, addressing “Why, What, How, and So What.”
- This report includes detailed profiles of each service provider, outlining their Horizons placement, provider facts, and strength and development opportunities.
- The report evaluates the overall condition of the THL industry, scrutinizes leadership goals for digital transformation, presents new examples of influential change agents, evaluates service providers' investments in their THL-focused abilities, and suggests suggestions for THL leaders and providers of THL-focused services.

# The travel, hospitality, and logistics services value chain

- HFS developed the industry value chain concept to graphically depict our understanding of the processes and functions that specific industries engage in to operate their businesses.
- The industry value chain for travel, hospitality, and logistics operations provides a comprehensive overview of services for these sectors with subsector coverage falling into two primary buckets:
  - Business to consumer (B2C): This includes consumer-centric processes for the travel and hospitality sectors.
  - Business to business (B2B): This includes coverage for business-oriented processes within transportation and logistics.
- **Industry-specific processes:** HFS classifies industry-specific processes for THL by subsectors, including travel, hospitality, and transportation and logistics. We then additionally categorize industry-specific processes by front-, middle-, and back-office processes to provide further granularity. These functions represent the range of unique processes undertaken by THL firms to conduct their core business.
- **Enabling technologies:** Various change agents are digitally transforming the THL industries. They include elements such as RPA and artificial intelligence (AI), the internet of things (IoT), and smart analytics. Our research on these topics will focus on how THL firms utilize them, which service providers are bringing them to the table, and what significant business impact is being realized.
- **Horizontal IT and business processes:** Enterprises in all sectors have a range of consistent business and IT processes that are essential to running their businesses and executed similarly regardless of industry. We refer to these as horizontal processes and have segmented them by IT and business functions. Our industry-specific coverage of these areas will focus on instances where something unique has been developed for the industry, such as automated solutions for ticket re-booking or claims processing for refunds.

# The travel, hospitality, and logistics value chain

		B2C—travel and hospitality		B2B—logistics
		Travel	Hospitality	Transportation and logistics
Industry specific	In-scope	Airlines, airports, cruise lines, online travel agencies (OTA)	Hotels, casinos, golf clubs, restaurants, theme parks	Trucking, shipping, freight
	Front office	<ul style="list-style-type: none"> <li>Reservations</li> <li>Loyalty program management</li> <li>Frequent-flier helpdesk</li> <li>Guest relations</li> </ul>	<ul style="list-style-type: none"> <li>Reservations</li> <li>Loyalty program management</li> <li>Guest relations</li> </ul>	<ul style="list-style-type: none"> <li>Order taking</li> <li>Fleet and crew management</li> <li>Operations and fleet administration</li> </ul>
	Middle and back office	<ul style="list-style-type: none"> <li>Irregular operations management</li> <li>Airline operations</li> <li>Passenger and cargo revenue accounting</li> <li>Refund claims processing</li> <li>Fare audit</li> </ul>	<ul style="list-style-type: none"> <li>Refund claims processing</li> <li>Demand forecasting for occupancy</li> </ul>	<ul style="list-style-type: none"> <li>Order processing</li> <li>Inventory management</li> <li>RCM for revenue leakage</li> <li>Warehouse management</li> <li>Transportation management</li> </ul>
Horizontal	Enabling technologies			
	RPA   Intelligent document processing   Artificial intelligence   Smart analytics   Machine learning   Blockchain   IoT   Cloud   Mobility			
	Horizontal business processes			
	Customer experience   Human resources   Procurement   Finance and accounting   Payroll   R&D			
	Horizontal IT processes			
Plan, design, and implementation   Application development and maintenance   Infrastructure management   Cybersecurity				

# HFS Horizons—aligning enterprise objectives with service provider value



## SYNERGY is Horizon 3

### *Horizon 3 service providers demonstrate*

- Horizon 2 +
- Ability to drive a **OneEcosystem synergy** via collaboration to create completely **new sources of value**
- Strategy and execution capabilities at scale
- Well-rounded capabilities across all value creation levers: talent, domain, technology, data, and change
- Driving co-creation with clients as ecosystem partners
- Referenceable and satisfied clients driving new business models with partnerships

## EXPERIENCE is Horizon 2

### *Horizon 2 service providers demonstrate*

- Horizon 1 +
- Ability to drive a **OneOffice model of end-to-end organizational alignment** across the front, middle, and back offices to drive **unmatched stakeholder experiences**
- Ability to support clients aligning customer and employee experiences
- Global capabilities with strong consulting skills
- Capability to deliver enterprise transformation as an ongoing multi-year managed service
- Proven and leading-edge proprietary tools, assets, and frameworks
- Referenceable and satisfied clients for their ability to innovate

## OPTIMIZATION OUTCOMES is Horizon 1

### *Horizon 1 service providers demonstrate*

- Ability to drive **functional optimization outcomes**
- Driving cost reduction, speed, and efficiency
- Strong implementation partners
- Offshore-focused with strong technical skills
- Robust fundamentals of cloud-transformation
- Referenceable and satisfied clients for their ability to execute



# 2

## Research methodology

# 21 service providers covered in this report

 **accenture**

*Capgemini* 

**Coforge**

 **cognizant**

**<epam>**

**EXL**

 **genpact**

**HCLTech**

  
**HEXAWARE**

 **Hitachi Vantara**

**IGT**  
SOLUTIONS

**Infosys**<sup>®</sup>  
Navigate your next

 **LTIMindtree**

 **Mphasis**  
The Next Applied

publicis  
**sapient**

 **SUTHERLAND**<sup>®</sup>

**tcs** **TATA**  
CONSULTANCY  
SERVICES

**Tech**  
**Mahindra**

 **Teleperformance**

**wipro** 

**WNS**

Note: All service providers are listed alphabetically  
Accenture, Capgemini, EPAM, EXL, Genpact, Infosys and Wipro did not actively participate. We built their profiles based on publicly available information and inputs from their clients.

# Sources of data

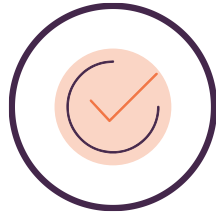
This Horizons research report relies on myriad data sources to support our methodology and help HFS obtain a well-rounded perspective on service capabilities of the participating organizations covered in our study. Sources are as follows:



## Briefings and information gathering

HFS conducted detailed **briefings** with travel, hospitality, and logistics leadership from each vendor.

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



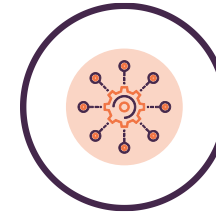
## Reference checks

We conducted reference checks with **31 active clients and 25 active partners** of the study participants via survey-based and telephonic interviews.



## HFS Pulse

Each year, HFS fields multiple demand-side surveys in which we include detailed vendor rating questions. For this study, we leveraged our fresh-from-the-field HFS Pulse Study data featuring **~60 service provider ratings from THL 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 travel, hospitality, and logistics

The research for the *HFS Horizons: Travel, Hospitality, and Logistics Service Providers, 2023* report evaluates the capabilities of service providers across a range of dimensions to understand the **Why, What, How, and So What** of their service offerings supporting the **travel, hospitality, and logistics sector**. Our assessment will be based on inputs from clients, partners, and employees and augmented with analyst perspectives. The following illustrates how we will assess your capabilities:

		← Distinguishing supplier characteristics →		
Assessment dimension	Assessment sub-dimension	Horizon 1 service providers	Horizon 2 service providers	Horizon 3 service providers
<b>Value proposition: The Why?</b>  (25%)	Strategy for the travel, hospitality, and logistics market and vision for the future of the industry	<ul style="list-style-type: none"> <li>Ability to drive <b>functional optimization outcomes</b> through cost reduction, speed, and efficiency</li> </ul>	<ul style="list-style-type: none"> <li>Horizon 1 + enablement of the <b>OneOffice model</b> of <b>end-to-end organizational alignment</b> across the front, middle, and back offices to drive <b>unmatched stakeholder experience</b> (EX, PX, CX)</li> </ul>	<ul style="list-style-type: none"> <li>Horizon 2 + ability to drive <b>OneEcosystem synergy</b> via collaboration across multiple organizations with common objectives around driving completely <b>new sources of value</b></li> </ul>
	Travel, hospitality, and logistics offerings aligned to top problem statements for the sector			
	Differentiators—why travel, hospitality, and logistics firms work with you			
<b>Execution and innovation capabilities: The What?</b>  (25%)	Breadth and depth of services across the travel, hospitality, and logistics value chain and associated delivery capabilities	<ul style="list-style-type: none"> <li>Functional domain expertise for segments of the travel, hospitality, and logistics value chain</li> <li>Industry-specific talent focused on key process domains or tech</li> <li>Focused partnerships and strong partner experience (PX)</li> <li>Limited industry-specific IP</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive coverage across the travel, hospitality, and logistics value chain</li> <li>Strong industry-specific talent pool across IT and operations domains</li> <li>Range of industry-specific partnerships and strong PX</li> <li>Strong industry-specific IP</li> </ul>	<ul style="list-style-type: none"> <li>Comprehensive coverage across the travel, hospitality, and logistics value chain and beyond</li> <li>Strong industry-specific talent pool across consulting, IT, and operations domains</li> <li>Comprehensive industry-specific partnerships with strong PX</li> <li>Strong industry-specific IP + JVs</li> </ul>
	Strength of industry-specific talent—hiring, training, and ongoing development			
	Approach to and strength of ecosystem partners			
	Industry-specific technology innovation			
<b>Go-to-market strategy: The How?</b>  (25%)	What are you actually selling to travel, hospitality, and logistics firms?	<ul style="list-style-type: none"> <li>Investments aligned to functional optimization outcomes</li> <li>Optimization and point solutions</li> <li>Target focused personas and LOBs, mostly Tier 2 and 3 firms, geo-specific</li> </ul>	<ul style="list-style-type: none"> <li>Horizon 1 + investments aligned to enterprise experience</li> <li>Optimization and top-down transformation</li> <li>Target range of personas and LOBs, mostly Tier 1 and 2 firms, broad geo coverage</li> </ul>	<ul style="list-style-type: none"> <li>Investments aligned to Horizons 1 and 2 and ecosystem enablement</li> <li>Horizons 1 and 2 + co-creation with customers and partners</li> <li>Horizons 1 and 2 + new value creation</li> <li>C-suite coverage across LOBs and geographies for Tiers 1 and 2</li> </ul>
	Nature of investments in your travel, hospitality, and logistics business (M&A, non-M&A, R&D)			
	Co-innovation and collaboration approaches with customers and partners, including creative commercial models			
	Customer targeting approach			
<b>Market impact: The So What?</b>  (25%)	Scale of travel, hospitality, and logistics business—revenue, clients, and headcount	<ul style="list-style-type: none"> <li>Proven scale and growth driven by functional optimization focus</li> <li>Top marks as an optimization partner across key travel, hospitality, and logistics functions (CX)</li> </ul>	<ul style="list-style-type: none"> <li>Proven scale and growth driven by Horizon 1 + stakeholder experience</li> <li>Top marks as an enterprise transformation partner emphasizing stakeholder experience (CX, EX)</li> </ul>	<ul style="list-style-type: none"> <li>Proven scale and growth driven by Horizon 2 + ecosystem synergy</li> <li>Top marks as a global growth partner driving new business models (CX, EX, PX)</li> </ul>
	Growth of travel, hospitality, and logistics business—revenue, clients, and headcount			
	Proven outcomes showcasing nature of value delivered to travel, hospitality, and logistics			
	Voice of the customer			

# 3

## Market dynamics

# Executive summary

- 1 Horizon 3 service providers revealed**

We examined 21 service providers based on their value propositions (The Why), execution and innovation capabilities (The What), go-to-market strategies (The How), and market impact criteria (The So What). The Horizon 3 frontrunners, in alphabetical order, are Accenture, Coforge, Cognizant, HCLTech, IGT Solutions, Infosys, Publicis Sapient, TCS, Sutherland, and WNS. These providers excel in supporting clients on their journey from functional digital transformation to enterprise-wide modernization and generating new value through ecosystems. Key characteristics of these leaders include extensive industry expertise in the THL value chain, a comprehensive approach covering consulting, IT, and operations, a strong focus on innovation internally and with partners, collaborative innovation with clients and partners, and proven results and outcomes for THL organizations. We found a large group of providers landing in Horizon 3 due to the ecosystem approach inherent in delivering services to these industries.
- 2 What THL clients need from service providers**

The HFS Horizons model corresponds well with enterprise maturity. For this study, we asked THL leaders to provide feedback on the main value currently delivered by their service provider partners and their expectations for the next two years. Most respondents (69%) indicated that the present value lies in Horizon 1—functional digital transformation with a focus on digital optimization outcomes. In two years, the emphasis shifts toward utilizing service providers for achieving enterprise transformation (35%) and concentrating on driving growth and new value creation through ecosystem transformation (14%). THL companies should choose their partners based on the desired value.
- 3 How service providers meet THL firms' needs**

As THL firms evolve and mature across the Horizons model, service providers are on point to support these ever-changing needs. In our study, we found strong alignment between THL provider' push to Horizon 3—ecosystem transformation—and the fastest-growing service offerings from providers. Providers are prioritizing ecosystem synergy via collaboration, across multiple organizations with common objectives around driving completely new sources of value. CX elevation is ongoing and increasingly enabled by modernization, especially data initiatives. ESG needs are certainly on the radar for THL firms, but there is substantial definitional work to be done to better understand needs and solutions.
- 4 Voice of the customer (VOC)**

We did deep-dive interviews with more than 30 THL firms as part of our VOC research for this study. THL firms showed a clear pattern of leveraging service providers to enable their future growth, with quality, industry expertise, and transformation advice dominating provider selection criteria and innovation and modernization initiatives leading services scope.
- 5 Voice of the partners**

Service providers work with a range of partners to meet the needs of their THL clients, including hyperscalers and industry-skinned and industry-specific ISVs. Satisfaction is generally high from a partner experience standpoint, which bodes well for downstream client impact. However, partner perception of service providers is that they offer THL firms a higher level of value than the THL firms perceive. Enterprises need to better consider the value delivered via ecosystems.

# Key takeaways

## 01 Customer Experience

Demand in the travel, hospitality, and logistics sectors for seamless customer experiences is increasing. Newer technologies, such as AI, chatbots, and mobile apps bridge service gaps to enable personalized interactions, prompt communication, and efficient support.

## 02 ESG

With a growing preference for sustainable options, consumers are urging service providers to adopt environmentally friendly practices, such as lowering carbon emissions, utilizing renewable energy, and preserving natural resources. Consequently, numerous businesses are integrating sustainable measures into their operations, gaining a competitive edge.

## 03 Health and safety

In the wake of global health crises, health and safety have become paramount concerns for travelers and customers. Travel, hospitality, and logistics service providers have been implementing safety protocols such as contactless check-in and enhanced sanitation measures and providing real-time updates on travel advisories. By prioritizing the well-being of their customers, these businesses can give customers confidence in their services and maintain their loyalty.

## 04 Partnerships and collaboration

Strategic partnerships and collaborations among travel, hospitality, and logistics service providers have become increasingly important in today's competitive market. By forming alliances, companies can leverage each other's strengths, expand their customer base, and access new markets. This collaborative approach also fosters innovation and knowledge sharing, helping businesses stay ahead of the curve and meet the evolving needs of their customers better.

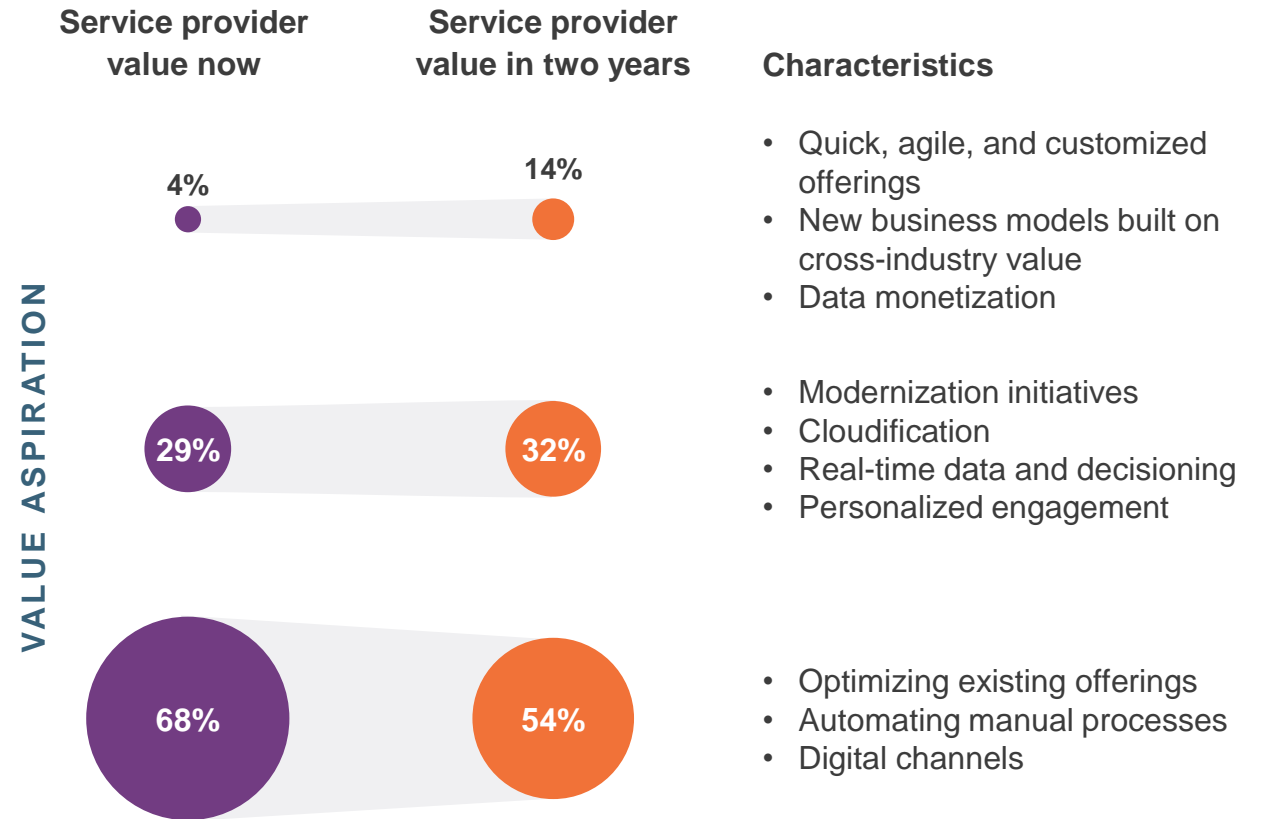
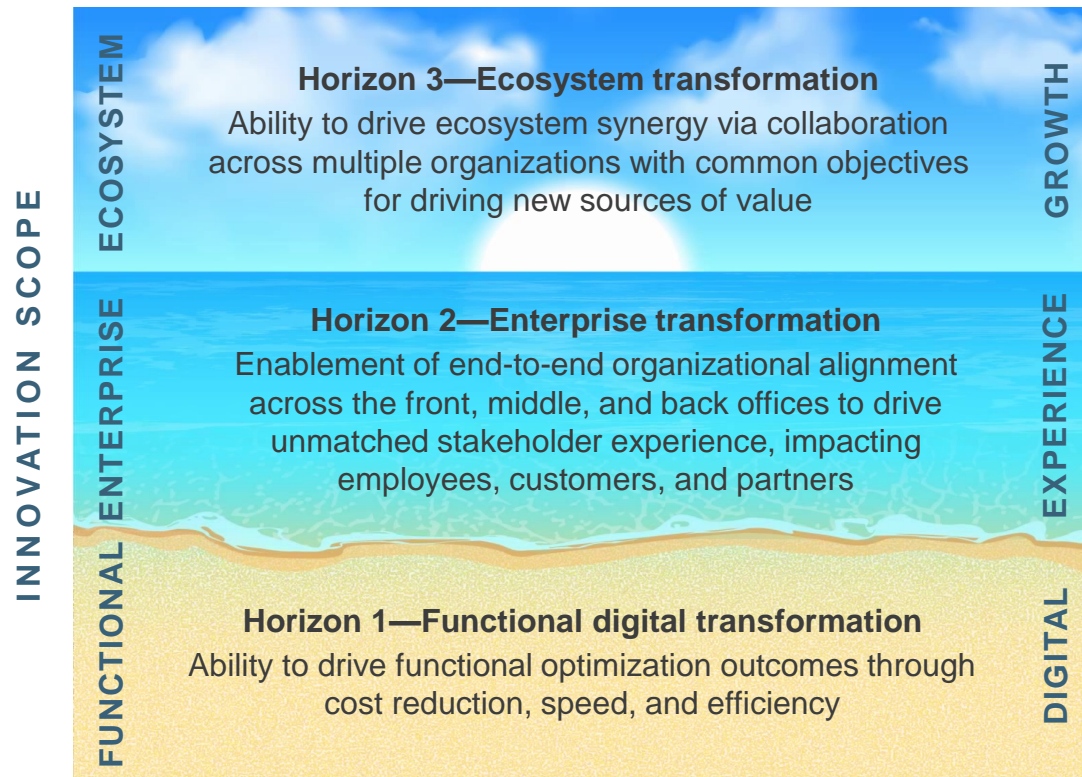
## 05 Employee training and development

Investing in employee training and development is crucial for travel, hospitality, and logistics service providers to maintain high service standards and foster a culture of excellence. Companies recognize the importance of continuous learning, offering training programs that equip employees with the latest industry trends, technologies, and best practices. This focus on professional development improves service quality and enhances employee satisfaction, retention, and overall company performance.

# The role of service providers is changing as THL sector matures and transforms

Which of the following statements best represents the primary value delivered by your service provider today? And in the next two years?

Percentage of respondents

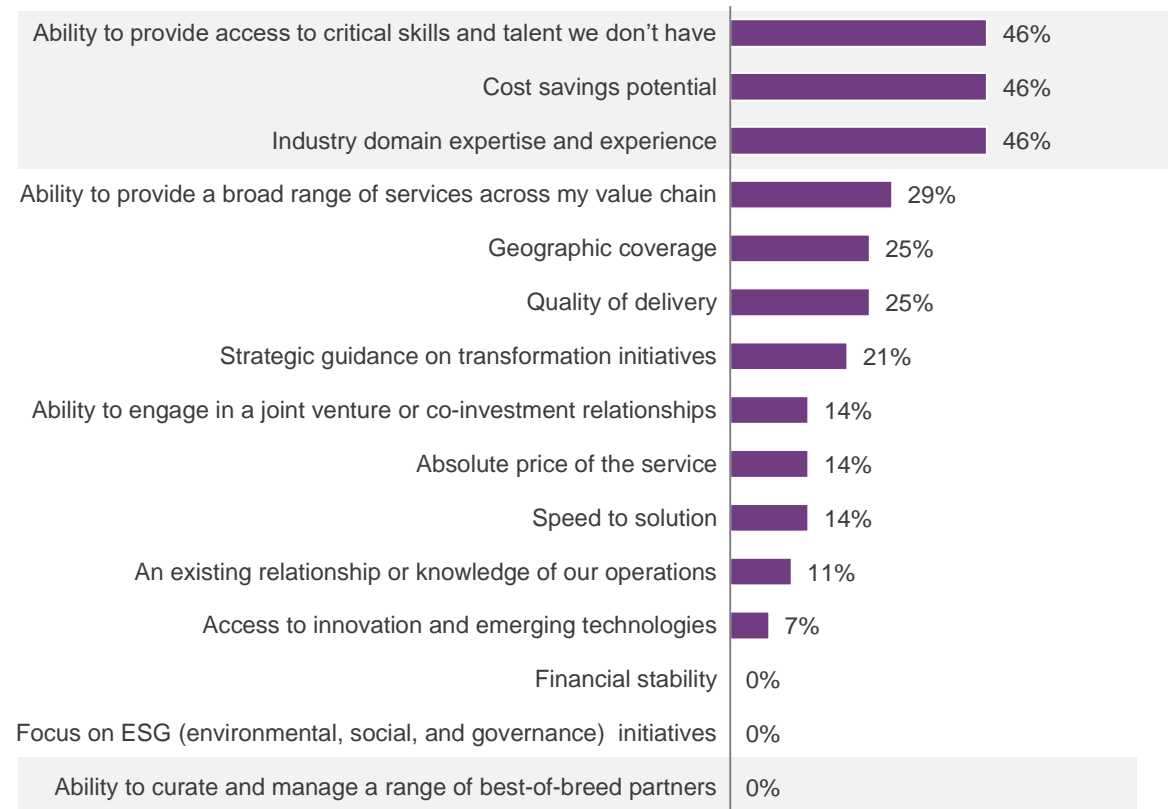


Sample: 30 THL client reference respondents  
Source: HFS Research, 2023

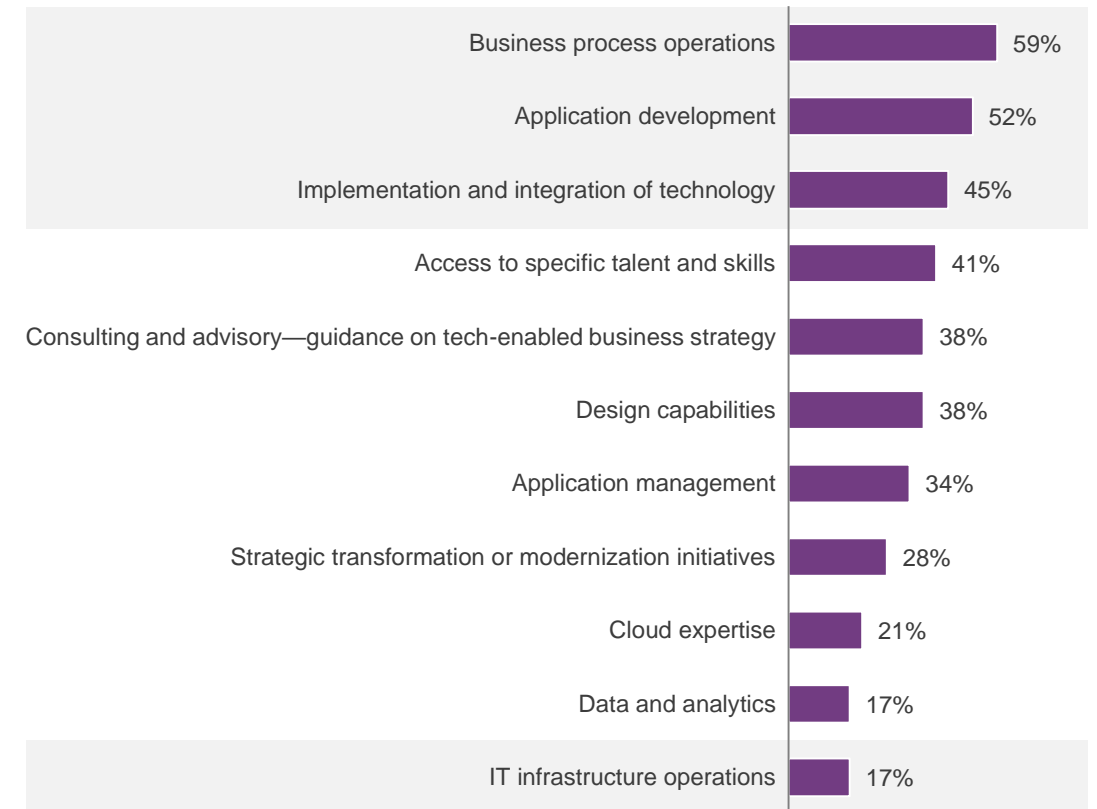


# THL sector service provider selection criteria and scope of use underscore a transformation focus—but ignore partners

## How did you pick this service provider? Percentage of respondents



## What do you use this service provider for? Percentage of respondents

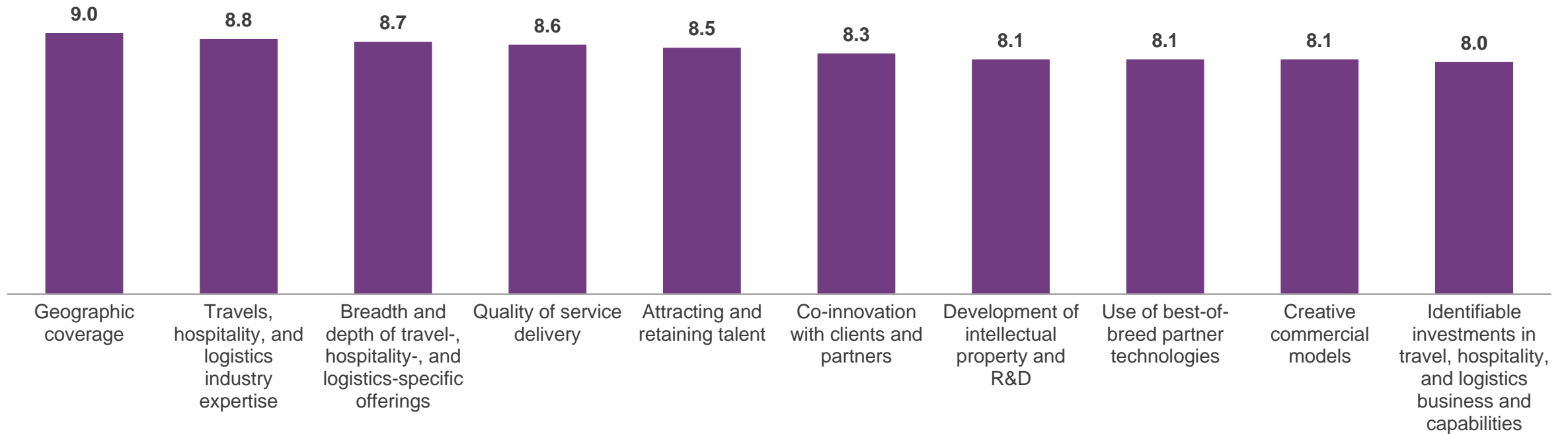


Sample: 30 THL client reference respondents  
Source: HFS Research, 2023

# THL firms are largely satisfied with their providers...

Please rate the service provider across the following parameters using a 1–10 scale, where 1 is poor and 10 is excellent.  
Weighted average of respondents

Average satisfaction 8.4



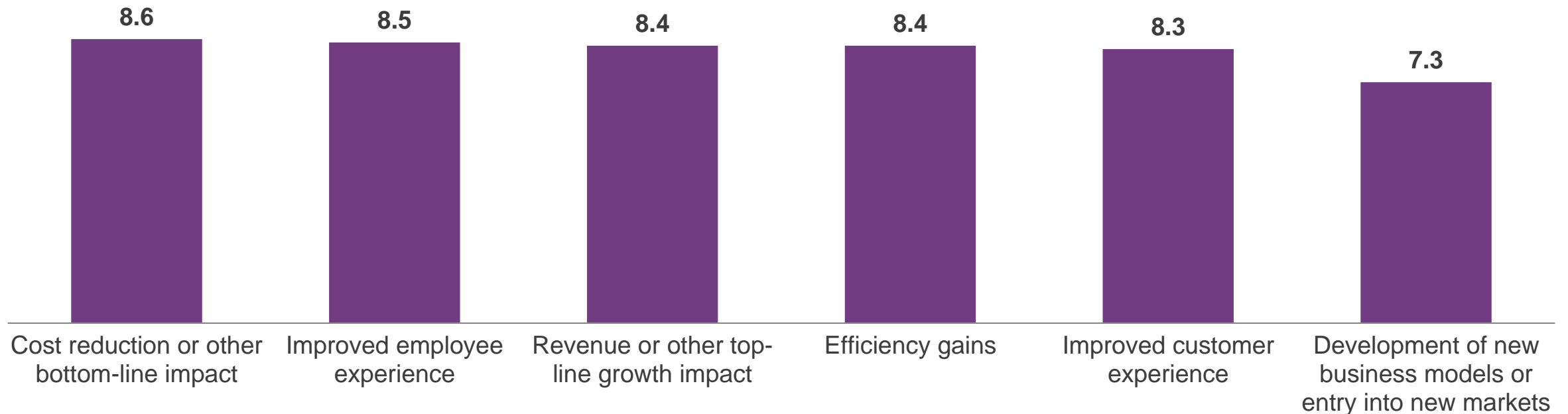
Sample: 30 THL client reference respondents  
Source: HFS Research, 2023

# ...but they are less satisfied with the outcomes their providers deliver

Please rate the outcomes delivered by your service provider across the following parameters using a 1–10 scale, where 1 is poor and 10 is excellent.

Weighted average of respondents

Average satisfaction 8.3

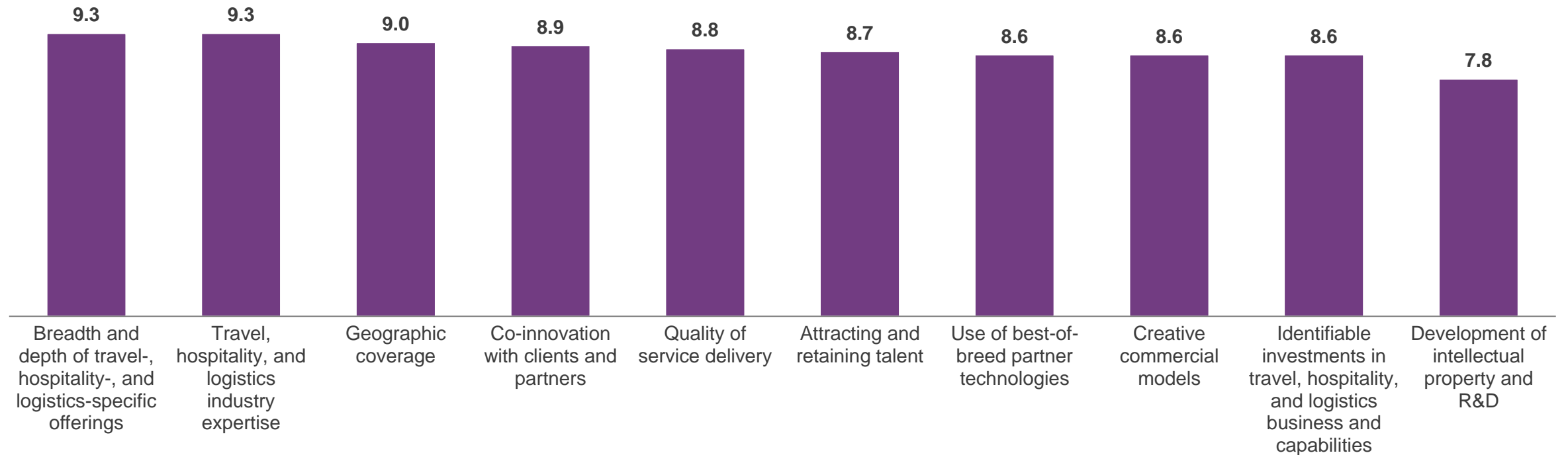


Sample: 30 THL client reference respondents  
Source: HFS Research, 2023

# The PX factor is high! Partners are generally very satisfied with their service provider relationships

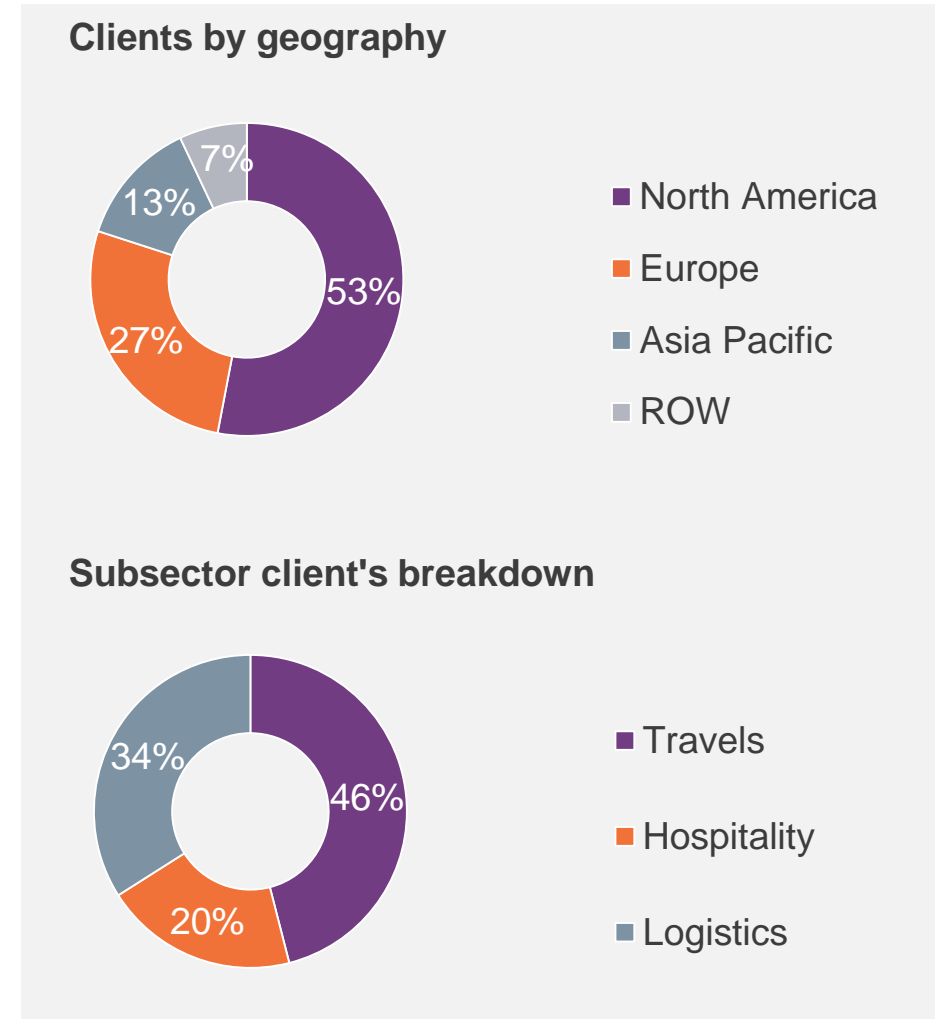
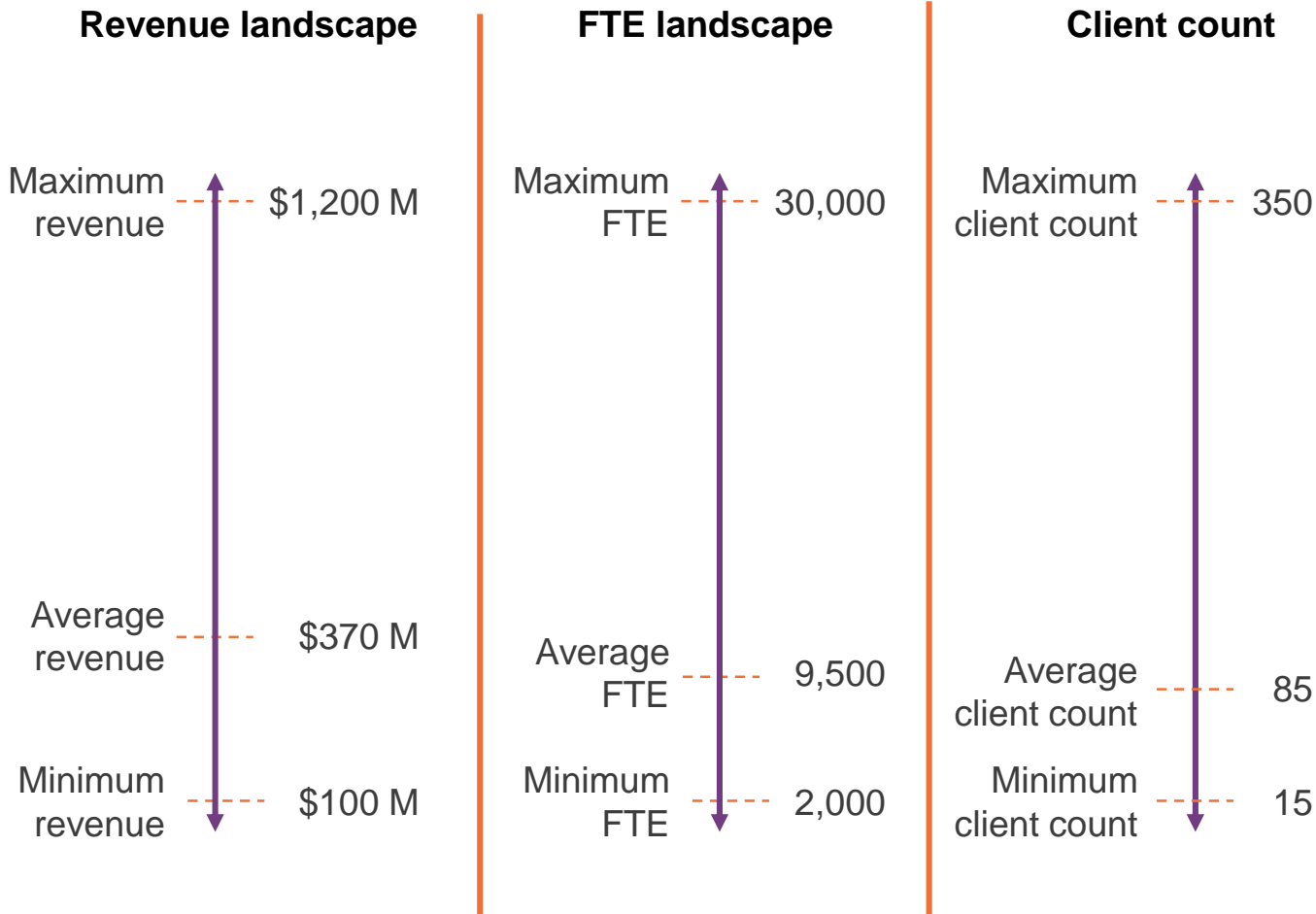
Please rate the service provider across the following parameters using a 1–10 scale, where 1 is poor and 10 is excellent.  
Weighted average of ratings

Average satisfaction 8.8



Sample: 28 partner respondents  
Source: HFS Research, 2023

# Travel, hospitality, and logistics service engagement landscape



Sample: Based on the assessment of 21 THL service providers' input representing 2,000 clients globally  
 Source: HFS Research, 2023

# 4

## Horizons results: Travel, hospitality, and logistics service providers, 2023

# HFS Horizons: Summary of providers assessed in this report

Providers (alphabetical order)	HFS point of view
<b>Accenture</b>	Strong vision for THL industry transformation
<b>Capgemini</b>	Empowering clients' growth through engineering and technology expertise
<b>Coforge</b>	Empowering the THL sector globally with deep expertise
<b>Cognizant</b>	Elevates hospitality and logistics through engineering expertise
<b>EPAM</b>	Leveraging engineering prowess to drive solutions that address customer challenges
<b>EXL</b>	Providing differentiation through a data-led strategy
<b>Genpact</b>	Offer a distinct edge with its AI-based digital business platform, Genpact Cora
<b>HCLTech</b>	Empowering through innovation and partnership in travel, hospitality, and logistics
<b>Hexaware</b>	Dynamic and adaptable partner with a customer-centric approach
<b>Hitachi Vantara</b>	Transforming travel and logistics with digital engineering expertise
<b>IGT Solutions</b>	Developing proprietary solutions for complex business challenges in the travel industry

Providers (alphabetical order)	HFS point of view
<b>Infosys</b>	Navigating the dynamics of travel, hospitality, and logistics with the latest technology
<b>LTIMindtree</b>	Developing operational excellence with growing relationships in travel
<b>Mphasis</b>	Industry-focused tech solutions provider, first mover in quantum technology
<b>Publicis Sapient</b>	Working to transform the future of THL with SPEED and innovation
<b>Sutherland</b>	Uses a platform-centric approach to solve travel and logistics challenges
<b>TCS</b>	Experienced transformation partner with deep industry expertise and strong IP portfolio driving innovation for THL Industry
<b>Tech Mahindra</b>	Using its analytics, consulting, and automation expertise for TTLH industries
<b>Teleperformance</b>	Powering CX through technology and talent
<b>Wipro</b>	Logistics expert combining consultancy, design, engineering, and implementation to solve customer problems
<b>WNS</b>	Driving THL business success through insights and outcomes-focused solutions

# HFS Horizons: The Best Service Providers for THL, 2023



## SYNERGY is Horizon 3

### Horizon 3 service providers demonstrate

- Horizon 2 +
- Ability to drive a **OneEcosystem synergy** via collaboration to create completely **new sources of value**
- Strategy and execution capabilities at scale
- Well-rounded capabilities across all value creation levers: talent, domain, technology, data, and change
- Driving co-creation with clients as ecosystem partners
- Referenceable and satisfied clients driving new business models with partnerships

## EXPERIENCE is Horizon 2

### Horizon 2 service providers demonstrate

- Horizon 1 +
- Ability to drive a **OneOffice model of end-to-end organizational alignment** across the front, middle, and back offices to drive **unmatched stakeholder experiences**
- Ability to support clients aligning customer and employee experiences
- Global capabilities with strong consulting skills
- Capability to deliver enterprise transformation as an ongoing multi-year managed service
- Proven and leading-edge proprietary tools, assets, and frameworks
- Referenceable and satisfied clients for their ability to innovate

## OPTIMIZATION OUTCOMES is Horizon 1

### Horizon 1 service providers demonstrate

- Ability to drive **functional optimization outcomes**
- Driving cost reduction, speed, and efficiency
- Strong implementation partners
- Offshore-focused with strong technical skills
- Robust fundamentals of cloud-transformation
- Referenceable and satisfied clients for their ability to execute

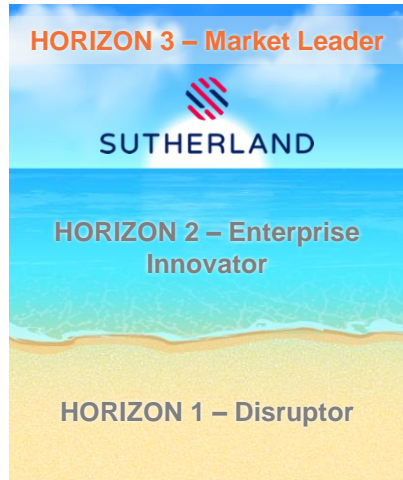
Note: All service providers within a "Horizon" are listed alphabetically



# 5

## Sutherland profile: Travel, hospitality, and logistics service providers, 2023

# Sutherland: Uses a platform-centric approach to solve travel and logistics challenges



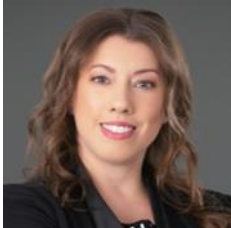
Strengths	Development opportunities
<ul style="list-style-type: none"> <li>• <b>THL industry expertise and capability:</b> Sutherland THL vertical provides a variety of services spanning the value chain. These services include insight and design, customer experience transformation, digital finance, passenger and cargo revenue accounting, analytics and AI, travel back office, digital engineering, technology solutions, and content services.</li> <li>• <b>Talent management:</b> Sutherland has consistently focused on talent development within its design capabilities, which include anthropological expertise and survey-based data collection, boding well for Sutherland better understanding its THL and consumer base.</li> <li>• <b>Differentiation:</b> Sutherland established a strategic partnership with IATA and formed industry alliances with ACH and Execs in the Know. Additionally, the company collaborates with Sabre and Amadeus. A significant portion of Sutherland's revenue, over 70%, is derived from models that are based on outcomes, gain-sharing, or risk-reward.</li> <li>• <b>Technology innovation:</b> Sutherland is adopting an end-to-end digitally embedded approach to service delivery. Its "Digital First" business model focuses on providing clients with advanced and seamless digital solutions. As part of this strategy, Sutherland is investing in future-ready platforms such as Sutherland Connect, Sutherland Anywhere, Sutherland Robility, and Sutherland altra.</li> <li>• <b>Customer kudos:</b> Clients commend Sutherland for its responsiveness and willingness to take a long-term view of the partnership. Additionally, the client values Sutherland's expertise and proprietary technology related to revenue accounting and its deep knowledge of the sector.</li> <li>• <b>Partner kudos:</b> Sutherland's partners have commended its BPO capability and praised the people they have interacted with. They have found them impressive, partner-oriented, and always available.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>What we'd like to see more of:</b> We would like to see more thought leadership from Sutherland, considering it's well known in the THL innovation space.</li> <li>• <b>Customer critiques:</b> Clients expect Sutherland to have a drive to optimize and improve the quality of its services. They also expect Sutherland to proactively bring forward process improvements and new technologies.</li> <li>• <b>Partner critiques:</b> Partners have expressed their expectation for Sutherland to enhance its adoption of public cloud technology.</li> </ul>

Relevant M&A and partnerships	Key THL clients	Global operations and resources	Flagship internal IP
<p><b>Acquisitions (2021–2023)</b></p> <ul style="list-style-type: none"> <li>• Augment CXM: AI-based customer experience platform company (2022)</li> </ul> <p><b>Partnerships</b></p> <ul style="list-style-type: none"> <li>• <b>General:</b> Zendesk, ServiceNow, Salesforce, Microsoft, Google, Pega, Genesys, Uniphore, and Worxogo</li> <li>• <b>Industry specific:</b> IATA, Sabre, and Amadeus</li> </ul>	<p><b>Number of clients:</b> 35</p> <p><b>Key clients</b></p> <ul style="list-style-type: none"> <li>• Top three global online marketplace for homestays</li> <li>• Europe's top three air cargo carriers</li> <li>• \$50+ billion global logistics company headquartered in Europe</li> <li>• World's top three oil field services company</li> </ul>	<p><b>Headcount:</b> 5,700</p> <p><b>Delivery and innovation centers:</b> 18</p> <ul style="list-style-type: none"> <li>• North America – US</li> <li>• Latin America – Jamaica, Colombia</li> <li>• Europe – UK, Bulgaria</li> <li>• APAC – Philippines, India, Malaysia, China</li> <li>• Middle East – Egypt, UAE</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Sutherland altra:</b> Next-generation passenger revenue accounting platform that is NDC and ONE Order compliant</li> <li>• <b>Sutherland Connect:</b> An omnichannel customer engagement and agent optimization platform with deep CRM integration</li> <li>• <b>Sutherland Robility:</b> An AI-based intelligent automation platform designed to accelerate and optimize repetitive processes</li> <li>• <b>Sutherland Extract:</b> An intelligent data extract platform that relies on OCR, workflow, and RPA to digitize paper-based processes</li> <li>• <b>Sutherland CX 360:</b> An AI-based speech and text analytics platform that automates quality and sentiment management</li> <li>• <b>Sutherland Sentinel AI:</b> An AI-based real-time employee monitoring platform designed to secure the work-at-home environment</li> </ul>

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HFS Research authors

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Executive Research Leader

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Melissa is an Executive Research Leader and Head of Research Operations at HFS Research. Melissa leads HFS' research initiatives for all things customer experience, including contact center, digital marketing and sales, CX design, and conversational AI. Her industry research focuses on key services dynamics within retail, CPG, travel, and hospitality firms.

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Mayank Madhur is an Associate Practice Leader at HFS Research, supporting different practice leads with a horizontal focus on IoT, Industry4.0, and Engineering. He also works with practice leads with a focus on industry verticals (mainly across healthcare; life sciences; and travel, hospitality, & logistics).

He holds a certificate in Strategic Management from IIM Kashipur. Mayank holds a Master's in Business Administration from Birla Institute of Technology and Science College, Pilani (BITS, Pilani University) and a Bachelor's in Engineering in Electrical and Electronics from Jawaharlal Nehru National College of Engineering (Visvesvaraya Technological University), Karnataka.



# About HFS

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