SaaS Partnerships in the Age of Hyperautomation

A Survey of EMEA Systems Integrators

Jitterbit

Move over business transformation—we're now firmly in the age of hyperautomation.

Off the back of a period of immense digital transformation, where businesses were forced to rapidly integrate thousands of new pieces of software to enable a new, more digital world, we've now entered the next phase; hyperautomation.

Clearly, the speed of innovation isn't slowing down. The incredible pace of change over the last few years has set a new benchmark. Automating every business process possible has now become mandatory for companies wishing to stay competitive.

There is no automation of course without integration and the connection of all the various software, platforms, and technologies that go into each process, product, and service.

Here at Jitterbit, we wanted to discover how systems integrator customers feel about hyperautomation. What's driving their desire to automate, and are systems integrators aware of this? Is the connection between integration and automation understood? Are systems integrators aware of the benefits of a partner strategy in facilitating automation for their customers and growth for themselves?

We also wanted to understand how automation and integration are perceived—both by systems integrators on whom so many businesses rely—and by their business customers themselves. Interestingly, our research revealed that 76% of systems integrators believe their customers increasingly value automation more than integration.

This goes to the heart of every systems integrator's value proposition, indicating potential disruption of long-held customer relationships in this new age of hyperautomation. For system integrators to thrive in the midst of so much disruption, it's necessary for them to reposition as enablers of greater process automation while maintaining their cutting-edge expertize in integration.

If systems integrators can meet the challenge head-on, with the support of strategic partners and by leveraging new tools and technologies, the opportunity is there for them to expand their customer offerings and remain relevant in the age of hyperautomation.

We have long-standing relationships with our systems integration partners across EMEA. We know firsthand the tremendous value and opportunity they create for their customers. We hope that this report will give this important community of systems experts greater insight into macro trends and help them harness hyperautomation for their—and their customers—success.

Joost De Bot

VP & GENERAL MANAGER, EMEA

Jitterbit

Methodology and Sample

This report is based on anonymized data collected by market research house Norstat from 100 senior systems integrator professionals based in the UK, Benelux, and DACH regions. These professionals come from a range of industries, including IT, financial, and professional services. They have a range of roles inside their companies, including digital transformation leads, CEOs, and head of operations. Their companies range in size, going all the way up to more than 5,000 employees, as do their customer bases, ranging from less than 10 customers to more than 40. The research was conducted in April 2022.

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Welcome to the Age of Hyperautomation

The position of integration as the driving force behind business transformation has been underlined by the recent period of unexpected events and change.

Global events have driven more business transactions and internal processes online than ever before, and prompted a sharp pivot to remote and distributed working—resulting in never-before-seen pressure on our businesses' digital capabilities.

The digital foundations of organizations everywhere were exposed and their infrastructure rocked by these new requirements–forcing the average company to accelerate its digitization by the equivalent of seven years vs. previous rates in 2020 alone, according to McKinsey research.

Integration and ERP solutions underpinned the responses of many of these companies—joining the dots between the thousands of software solutions, platforms, and technologies businesses quickly implemented to deliver their products and services to customers.

Keeping pace

However, perhaps what's most startling is not that this rapid period of change took place, but that it's been maintained ever since, reshaping our expectations of what can be done and how quickly in the process.

This period was not an episode, but the start of a new era. And to remain competitive, companies are investing in ways to move even faster and work smarter—confirmed by Jitterbit's first-ever trends report study: **"The Road to Digitalization After the Pandemic—The Integration Trends Driving EMEA Recovery".**

Released in November 2021, the report revealed how 2,000 customers across EMEA committed to investing their way out of the challenges of the last two years. This included a 99% increase in eCommerce integration spend, and a 72% increase in employee experience.

That level of investment shows no signs of dropping. According to 2022 research by Gartner, 34% of US CIOs are planning to up investment in integration technologies, APIs, and API architecture.

These shifts have, understandably, placed enormous pressure on IT teams, with the volumes of processes and data they need to manage and connect for the rest of their businesses surging.

As whole companies battle to stay afloat in times of economic uncertainty, IT teams do so too, under the weight of added responsibility and the need to reduce spending while improving operational efficiency.

GRAPH 1

Responses to the statement: "Hyperautomation is a key business priority for customers of EMEA systems integrators in 2022."

| 28%	36%	26%	8%	2%
Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree

Introducing hyperautomation

It's a challenge that requires a new approach. Gartner identified the need to transform operations and operate at a highly accelerated pace—phasing out manual processes and the technical debt they rack up—as a top strategic trend in both 2021 and 2022 for businesses that wish to remain competitive.

They named the approach **"hyperautomation"**, meaning the business-driven, disciplined approach where organizations rapidly identify and automate as many business processes as possible using a diverse mix of tools (see figure 1). It's an approach that holds the key for companies to adequately handle this period of hyper change and growth.

Businesses of all kinds can benefit from the power of hyperautomation. Many already have, launching a hyperautomation strategy to upgrade processes in a range of areas—from accounts payable (receiving, processing, and paying invoices) to order management (extracting order information from customer communications, updating systems based on order placements and cancellations, and triggering necessary actions).

By leveraging these solutions, companies—specifically their IT teams—can do more without requiring more resources. But more than just staying afloat, hyperautomation smooths a pathway for growth.
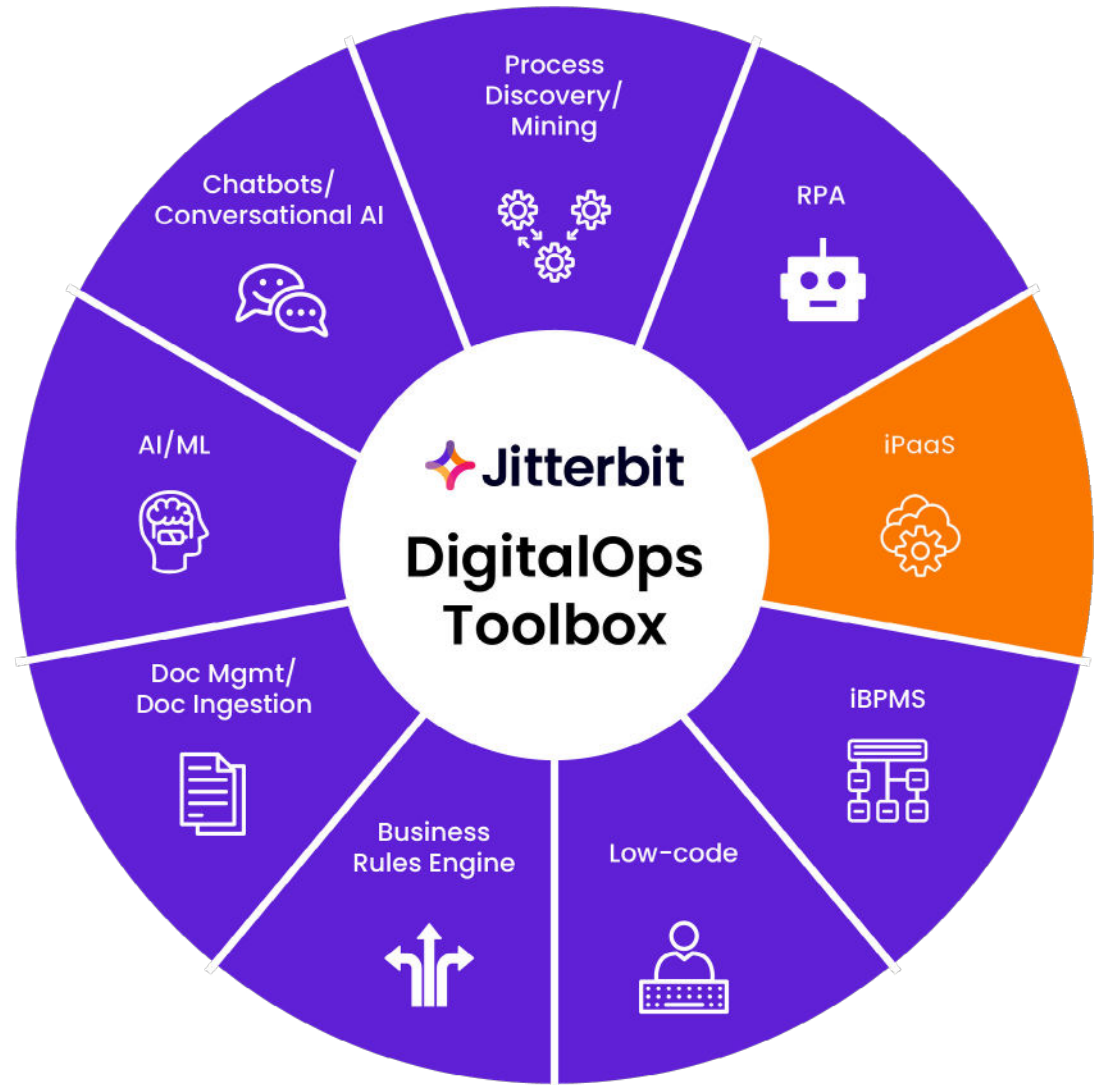
FIGURE 1

The tools that enable hyperautomation

Automation allows teams to:

> Cut out the errors and wasted time caused by human intervention, making processes more efficient, and accelerating processes

> Boost productivity, as a result, with employees freed from repetitive tasks to focus on higher-value activities

> Improve agility, with digitization enabling teams to adapt to a changing business landscape

> Collaborate effectively thanks to faster data sharing and seamless communication across operations.

According to **Gartner**, the market for hyperautomation technology will hit $596.6 billion in 2022, with organizations able to run 25% more tasks autonomously in 2023, and able to cut **operational costs by 30%** the following year if they combine a hyperautomation strategy with redesigned operational processes.

Amidst the chaos of recent times, old infrastructures, and aging manual processes began to creak, and fast. In its place, companies are starting to welcome the age of hyperautomation. Soon, it'll no longer be an option, but the basis of how companies have to do everything going forward—a condition of their continuance.

The world of systems integrators will be transformed too by this shift toward hyperautomation—a trend that the systems integrators we surveyed—and their customers—are well aware of. **According to our research, 64% of those asked agree that hyperautomation is a key business priority for their customers in 2022 (Graph 1).**

Systems integrators are clearly aware of the importance of hyperautomation to them, their customers, and their futures. Acceptance and prioritizing are the first steps on the hyperautomation journey. As this report continues, we'll see what else systems integrators can expect on the road to hyperautomation, and how best to navigate the challenges this poses.

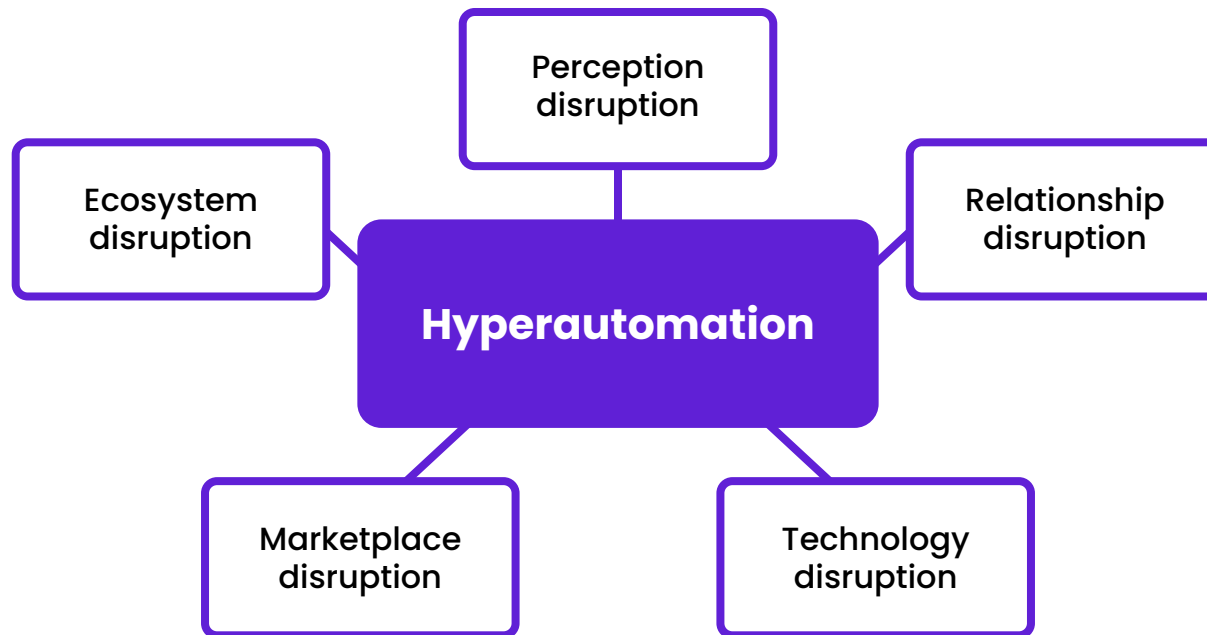# What Does Hyperautomation Mean for Systems Integrators?

Every sector will be impacted by the arrival of the age of hyperautomation, and so every company has to develop a hyperautomation strategy to navigate this new landscape.

It's no different for the systems integrator ecosystem—the age of hyperautomation has huge implications for systems integrators, the

relationships they have with clients, and the stability of the ecosystem as a whole.

In this section of the report, we break down five ways hyperautomation is changing the landscape for systems integrators.

Five Ways the Age of Hyperautomation is Disrupting the World of Systems Integrators

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                    ┌──────────────┐
                    │  Perception  │
                    │  disruption  │
                    └──────────────┘
┌──────────────┐                          ┌──────────────┐
│  Ecosystem   │                          │ Relationship │
│  disruption  │      Hyperautomation     │  disruption  │
└──────────────┘                          └──────────────┘
        ┌──────────────┐      ┌──────────────┐
        │ Marketplace  │      │  Technology  │
        │  disruption  │      │  disruption  │
        └──────────────┘      └──────────────┘
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01

Perception disruption

Companies are increasingly aware of the need to ensure their solutions are fully integrated as a way of ensuring their digital capabilities are as good as they need to be. But they're taking note of the price of integration too.

If a business buys a new solution, they now know they also have to pay to integrate it with the rest of their digital infrastructure. For every $1 spent on software, they're spending $4–5 on adapting and integrating that solution. According to Gartner, that results in IT teams spending 34% of their budgets on integration projects.

While aware of its value, companies see integration increasing the total cost of ownership—putting pressure on those doing the integrating to keep costs down and improve efficiency. **Perhaps this is why systems integrators see their own customers as a cause of major disruption, with 42% of survey respondents ranking their own customers highly (Graph 2).** Customers want value for money, and today, the real value lies in automating as many processes as possible to achieve that.

02

Relationship disruption

An inflated total cost of ownership can push companies into seeking alternative approaches—like investigating if they can take care of integration projects themselves.

Traditionally, when a new requirement changes a process or workflow across systems, business teams have to wait for IT staff to custom code an integration. In the rush to digitize we're currently experiencing, that wait can be a long one. Low-code applications have made this less of a hurdle, because employees outside the IT team can build their own integrations, removing the holdup.

This is highlighted in our research, with systems integrators suggesting the availability of self-serve iPaaS (selected by 42%—Graph 2) and the increased customer adoption of Cloud solutions (selected by 52%—Graph 2) are highly disruptive factors to their work.

It's clear talking to EMEA systems integrators that their customers are taking advantage of solutions they can access directly themselves.

The knock-on effect of this is a change in the relationship between system integrators and their customers, with customers relying more on self-serve, low-code tools like iPaaS and APIs than the system integrators that had previously supported them.

GRAPH 2

'Responses to the statement: "What are the biggest disruptors to your business right now?"'

54%
Online solution marketplaces i.e., The Hut Group

52%
Increased customer adoption of Cloud solutions

47%
Other System Integrators

38%
Other Global SIs / Large consultancy firms

42%
Self-serve iPaaS

42%
Your own customers

20%
We are not being disrupted

We asked respondents to rank these seven options from 1-7, with 1 being the most disruptive. The percentages on the top show the percent of people who put that option in their top three.

03

Technology disruption

The adoption by customers of cloud-based tools to take integration work in-house—and the resulting 'best-of-breed' approach to vendor selection that this encourages among businesses—has another major impact on the systems integrator ecosystem. This move relieves companies of their reliance on monolith solutions—in turn reducing their dependence on the systems integrator companies that support the integration of those solutions.

04

Marketplace disruption

These three disruption factors are transforming the lives of systems integrators. In the old world, customers were reliant on the expertize of a systems integrator, who they'd turn to for help in fulfilling whatever particular integration requirement they had. Back then, systems integrators were a huge piece of the integration puzzle.

Now, as the existing landscape fractures, an additional challenge for systems integrators has appeared in the form of rival solution providers. We're seeing alternative options popping up in the shape of growing, dynamic solution marketplaces—such as Jitterbit's marketplace—a factor that's shaking up the industry.

More than half of respondents (54%—Graph 2) to our survey rank the arrival of online solution marketplaces as one of the top three most disruptive trends in EMEA at the moment.

These portals bring together a range of previously-built connectors for resale, which users can pull up, select, and download in a matter of moments. These pre-used and pre-approved solutions reduce the need for advice and input from integration experts.

"Historically, we've developed, maintained, and supported our own integration tools specific to each customer, which, while meeting the customer requirements, 100% impacted our HPS support team."

"Jitterbit's easy to use tools enable our SMEs and technical consultants to quickly build, test and deploy integrations within our client environments."

"And, even though Jitterbit is a large organization, it maintains its ability to be creative and innovative in delivering new products which we and our customers value. Their support is second to none and aligns very well with our quality objectives— as well as our customers."

– Hyde Park Solutions, UK

HPS™
Hyde Park Solutions

05

Ecosystem disruption

The circular economy approach has come to the world of integration—increasing the level of competition in the systems integrator ecosystem. The ability to resell solutions that have been made for them turns companies who were previously the clients of systems integrators into competitors. If you paid for a solution and you know it works well, why wouldn't you try and maximize your investment?

That's exactly what companies are doing, taking what they've learned and developed across their integration challenges, and reselling it, API and all, to other companies.

It's an increasingly disrupted and competitive world out there for systems integrators, who see their own customers (42% ranking them in the top three disruption factors—Graph 2) and other systems integrators (47% ranking them in the top three disruption factors—Graph 2) as sources of disruption within the integrator ecosystem.

We should be clear at this moment to say that disruption isn't a negative force by nature. Challenges like those outlined in this section can, with the right approach, be harnessed for positive growth by systems integrators. Companies need to look at each of these factors and consider how they can make them work for them.

Rather than considering them a threat, can a systems integrator use marketplaces to their own advantage and widely distribute their own solutions? Instead of worrying about the availability of self-serve iPaaS to customers, can systems integrators find their own partner to provide their solutions to?

Hyperautomation has opened up the systems integrator ecosystem. We believe the so-called challenges outlined here deserve a rebrand as opportunities. The companies that make the most of this new situation will be the ones that ride those waves of disruption, choosing instead to go with them instead of standing still, embracing the change, and learning what they can offer in the age of hyperautomation.

It's clear that this willingness is shared by those we questioned, with a fantastically high level of interest in automation in the systems integrator community already evident (Graph 3). In the next section, we'll go into more detail on how exactly systems integrators can embrace automation.

GRAPH 3

Responses to the statement: "As systems integrators, we are always looking for ways to automate how we deliver our solutions to customers."
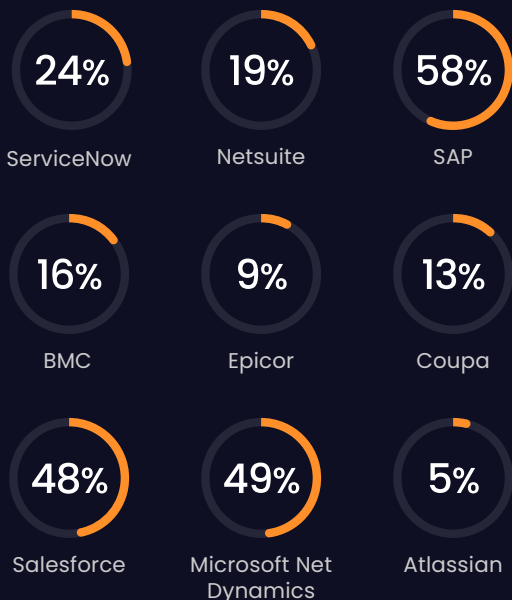
32%
Strongly agree

47%
Agree

16%
Neither agree nor disagree

4%
Disagree

1%
Strongly disagree
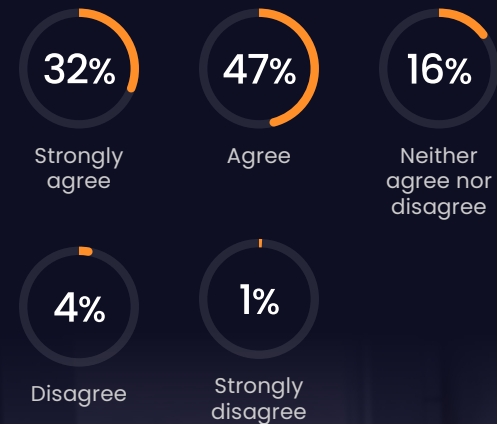
Embracing the Age of Hyperautomation

GRAPH 4

"Most popular software platforms currently supported."

24% ServiceNow	**19%** Netsuite	**58%** SAP
16% BMC	**9%** Epicor	**13%** Coupa
48% Salesforce	**49%** Microsoft Net Dynamics	**5%** Atlassian

With great disruption, comes great opportunity. Systems integrators who quickly get to grips with the disruption, embrace the change, and locate the right approach for them—i.e., through partnerships—can establish themselves as crucial figures in this new era.

From their customers' perspective, helping them implement a hyperautomation strategy is non-negotiable, with their reasons for this both varied and compelling. **According to our research, more than half of EMEA systems integrators are embracing hyperautomation to be more efficient with both time and money—54% see hyperautomation as a way to reduce operating costs, while 52% hope for a reduced workload (Graph 5).**

Companies who work with systems integrators, like most businesses in this new era, find themselves up against it in terms of managing new digital requirements. **They don't really want to rip everything up and start again— only 13% want to "do more with fewer people" (Graph 5)—they just want to be faster and more financially robust.**

This is reason enough for systems integrators to embrace hyperautomation. If they do, they'll have access to a lucrative market—the global systems integration market size is expected to reach $955.21 billion by 2030, expanding at a CAGR of 13.2% from 2022 to 2030, according to a recent report by **Grand View Research, Inc.**

But for those unsure, here are four more reasons a world of hyperautomation includes systems integrators and their skills.

GRAPH 5

Responses to the question: "When it comes to your customers, what are the key drivers for embracing hyperautomation?"

34% Get to market faster	**41%** Reduce margin of error	**13%** Reduce people requirements
52% Reduce workload	**41%** Make real-time data-led business decisions	**1%** Other
54% Reduce operating costs	**48%** Improve data accuracy and speed	

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Four Ways Hyperautomation Presents an Opportunity for Systems Integrators

01

Hyperautomation relies on integration; systems integrators can offer both

Automation needs integration. Hyperautomation transforms an organization's processes for gathering, analyzing, and deploying data. To do this, hyperautomation efforts rely on a toolbox with robotic process automation (RPA), data warehousing elements (data lakes and data integration hubs, for example), and analytic solutions.

But, and here's the key part, these tools can only be applied once the multitudes of applications and systems they rely on to deliver products, services, and solutions to their customers have been integrated.

However, according to our research, customers increasingly overlook this—with **76% of systems integrators agreeing their customers increasingly value automation more than integration (Graph 6)**.

While the value of integration can't be disputed, the perception of it is changing. Ultimately, the job of the systems integrator is to make the customer's technology work in whatever way necessary. If customers want automation, systems integrators have to offer both automation and integration, if they want to remain an option for their customers. If they can do that, their role will grow as the pace of adoption of new technologies accelerates.

GRAPH 6

Responses to the statement: "Customers increasingly value automation more than integration."

29%	47%	14%	7%	3%
Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree

02

It's a chance to diversify

If low-code, self-serve tools have opened the door for "business technologists" to develop their own integrations, then why shouldn't systems integrators get in on the act?

In all the recent changes, the most important thing for systems integrators remains the focus on the customer and their specific needs. If system integrators partner with iPaaS companies to expand their knowledge of integrations, they can diversify their capabilities and the solutions they offer—which can then be sold back to customers.

The systems integrators that stand out to clients will be the ones who offer solutions tailored to client needs and issues. Cookie-cutter solutions are off the table—but solutions that are convenient and accessible, in a world of hybrid working, will be highly rated.

This already appears to be on the mind of systems integrators. In Graph 7, we can see that 63% of those surveyed believe partnerships with iPaaS companies are the route forward for them.

GRAPH 7

Responses to the statement: "As a systems integrator, partnerships with iPaaS companies are key to our future success as a business."

22%	41%	33%	2%	2%
Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree

03

The marketplace ecosystem is open to everyone

An expanded understanding of different integrations and a range of new solutions needn't be limited to use in singular transactions with customers. The more systems integrators diversify and the more they master integration through partnerships, the more they can leverage the growing marketplace ecosystem.

Systems integrators should become active in the marketplace in the age of hyperautomation. Every custom integration created by a systems integrator can then be marketed to a wider pool of prospective customers on a marketplace.

Moreover, the marketplace effect is so strong that many customers—both B2B and B2C—have the potential to create API marketplace offerings of their own. Systems integrators can, if positioned right, provide integration services to enable this customer growth.

04

App building trend requires systems integrator expertize

There's an increasing need for businesses to create and develop their own enterprise apps—a trend that creates a market opportunity for systems integrators to partner with integration providers to help customers do this.

If the partner offers an off-the-shelf, custom "low-code" enterprise app, the systems integrator can leverage their customer insight. It's win-win, because the partner provides the solution, while the systems integrator gets to remain relevant to the customer needs—without needing to take on significant technical resources.

"Partnerships are vital to our hyperautomation strategy. We pick specific partners so we can offer the right solutions to our customers. Jitterbit is one of those partners, whose platform allows us to drive, configure and build hyperautomation candidates for our clients—identified by a combination of AI and analysis. It adds another technology solution to our stack, which we can then use to empower our customers to implement more automation across their business."

– KTSL, UK

KTSL

Moving Forward in the Age of Hyperautomation

The age of hyperautomation is already here. As outlined at the beginning of this report, companies everywhere are looking to remove manual processes from their systems to keep up with the new pace of business.

This includes systems integrators and their customers. The report started by showing that EMEA systems integrators are clearly aware of the value their clients now place on hyperautomation—**64% of systems integrators agree it's a priority for customers this year (Graph 1).**

This report concludes with the insight that systems integrators largely understand that they have a key role to play in making hyperautomation a reality for these same customers—with 78% of respondents agreeing that their role is vital in enabling their customers to become hyperautomated businesses (Graph 8).

Systems integrators are well placed to fulfill this role, having historically played an important part in helping companies with their digital transformation. They have the knowledge to make hyperautomation happen faster than anyone else because they've been sitting alongside these technologies long before companies decided to start trying them themselves.

As well as enabling customers, there's great potential to capitalize on the disruption caused by, and increasing valuation, of hyperautomation.

iPaaS partnerships are a secure way to do this. Establishing a relationship with iPaaS companies is an opportunity for systems integrators to understand more about new integrations and hyperautomation strategies—insight that can be used to level up their own capabilities, solutions, and ultimately, their value in the eyes of the customer.

GRAPH 8

Responses to the statement: "As a systems integrator we have a vital role in helping our customers become hyperautomated businesses."

20% — Strongly agree

58% — Agree

16% — Neither agree nor disagree

5% — Disagree

1% — Strongly disagree

In fact, not just in the eyes of a customer, but their value in the marketplace as a whole. Transformed by the partnership approach, systems integrators can take their new offerings to the marketplace stage, leveraging the scale to reach new customers.

Indecision or inaction in the midst of such rapid transformation is a significant business risk to any systems integrator—which is why it's positive to see EMEA systems integrators feel confident about the future. **Two-thirds of those surveyed rated their confidence about the growth potential of their business over the next two years as at least four out of five (Graph 9).**

GRAPH 9

Responses to the question: "Out of five, rate your confidence about the growth potential of your business over the next 2 years."

23%	43%	25%	8%	1%
5 Extremely Confident	4	3	3	1 Not Confident

Those feeling less confident could well be feeling negative because of the overall effect of disruption, the lack of a strategic plan, or limited relationships with strategic partnerships. Confident or not, to maximize the opportunity—or even just to get started—systems integrators should seek the right integration partners for their business to help them develop automated integration solutions. This, in turn, will allow them to offer innovation and deployment to their customers at scale and speed—crucial in this new age we find ourselves in.

"Our AI Talos platform rapidly identifies and analyzes inefficient and costly repetitive and manual processes for our Service Management and Operations customers, before our pre-packed Content and Automation Framework templates integrate and automate them. As a partner, Jitterbit has been a key enabler of our solutions—helping deliver integration, orchestration, and automation for our customers."

– FusionGBS

fusion
GLOBAL BUSINESS SOLUTIONS

Embrace the age of hyperautomation today with the right integration partner.

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