REGIONAL FOCUS: ASIA/PACIFIC

The Enterprise Automation Breakthrough to Power Digital Business

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Executive Summary

Enterprise automation is a critical underlying technology for organisations as they transit into the era of digital business.

This InfoBrief illustrates how an enterprise automation platform that is workflow-centric and citizen-developer friendly can help address common automation challenges by integrating disparate systems, applications, and data to enable end-to-end workflow automation across business and IT processes, as well as provide robust governance and oversight.

Finally, this InfoBrief details the role that an automation platform partner plays in this journey, and provides guidance on designing and executing an automation-powered digital transformation journey.

IDC DEFINITION

ENTERPRISE AUTOMATION

A unified approach to closed-loop automation, where AI continuously supports decision-making and automated actions that proactively optimise and enrich outcomes to maximise the business value across the entire organisation.


* Source: Enterprise Automation 2.0: The Connective Tissue of Digital Business (IDC #DR2023_GS4_RJ), March 2023

The future of business is digital

Digital technologies are fast becoming the foundation for future innovation and competitive differentiation through enhanced customer and employee experiences, and improved operational efficiency to drive business outcomes.

FIGURE 1
Revenue generated from digital business is expected to grow

Digital business revenue

2022
26%

2027
>40%
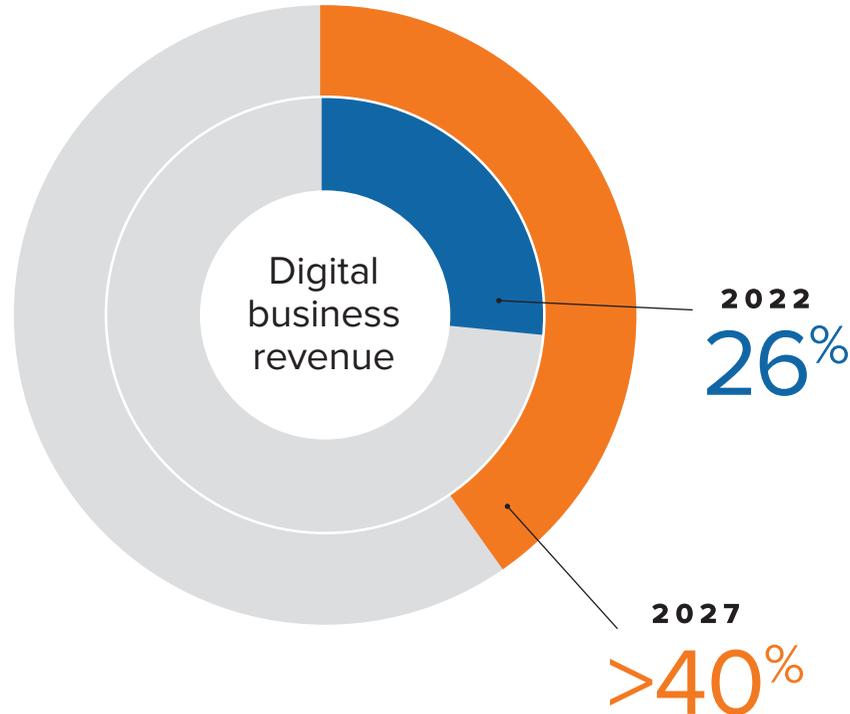
KEY OBSERVATION

To thrive in the age of digital business, enterprises need to transform their operating model to derive an increasing share of their revenues from digital technology powered offerings.
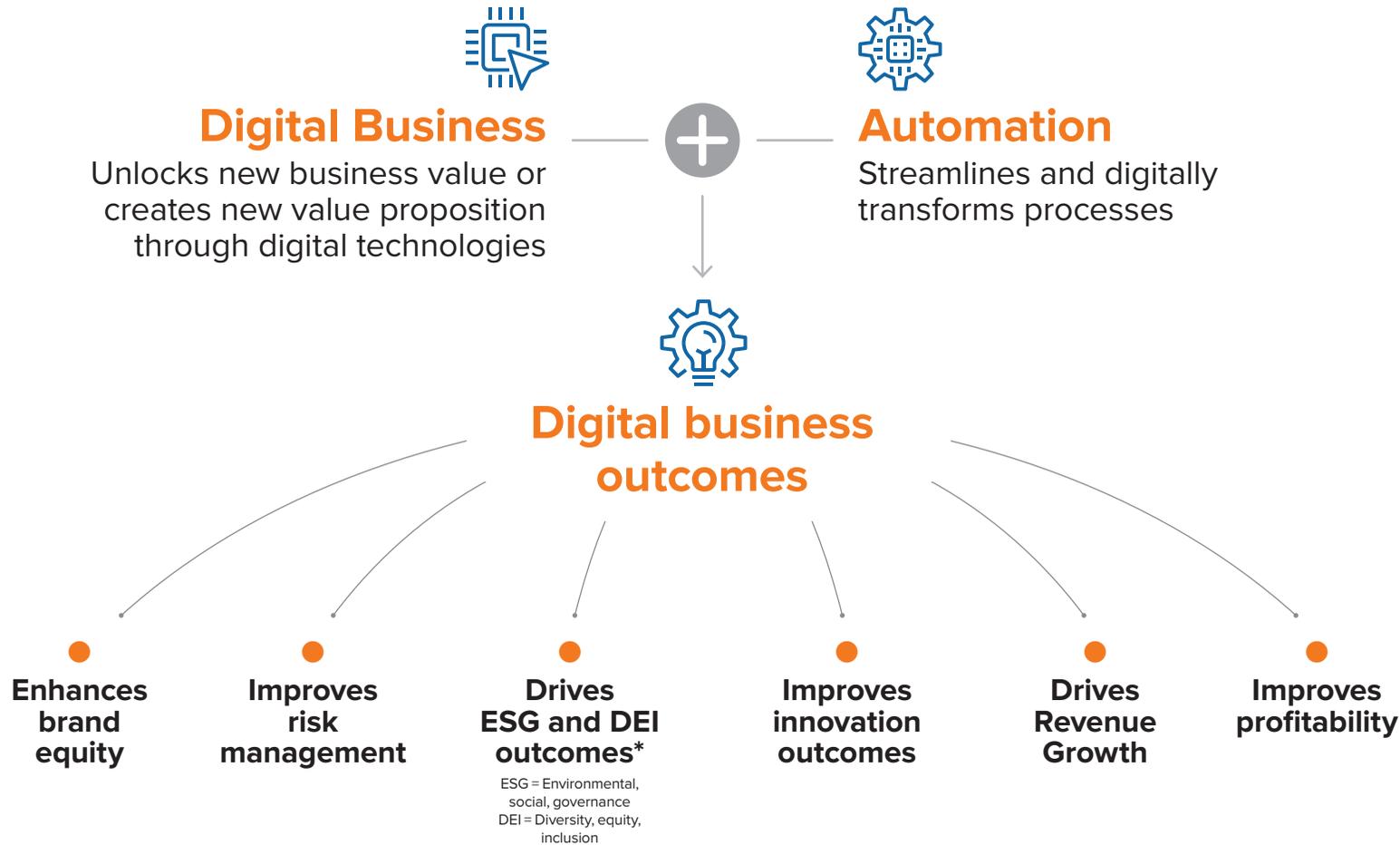
IDC> Prediction

By 2026, **40%** of total revenue for A2000* organisations will be generated by digital products, services, and experiences.

*Asia-based top 2,000 organisations

Sources: IDC Digital Business 2022; IDC WW CEO Sentiment Survey (APJ N = 123); IDC FutureScape: Worldwide Digital Business Strategies 2023 Predictions — Asia/Pacific (Excluding Japan) Implications

Automation: A foundational capability for running a digital business at scale

Digital Business

Unlocks new business value or creates new value proposition through digital technologies

Automation

Streamlines and digitally transforms processes

Digital business outcomes

- **Enhances brand equity**
- **Improves risk management**
- **Drives ESG and DEI outcomes***

  ESG = Environmental, social, governance
  DEI = Diversity, equity, inclusion

- **Improves innovation outcomes**
- **Drives Revenue Growth**
- **Improves profitability**

KEY OBSERVATION

By changing their business model through digital technologies and transforming their business operations through enterprise automation, organisations can realise both tactical objectives and strategic business goals.

Source: IDC Perspective: Digital Dream Team Archetypes in Asia/Pacific: The Technology Vendor's Guide for Selling to Digital-First C-Suites (#AP50343223), April 2023

Low/no code capabilities are critical to enterprise digital aspirations

DEVELOPERS

4 million

The anticipated worldwide shortage of full-time developers by 2025 makes it challenging for organisations to differentiate through software-led innovation.
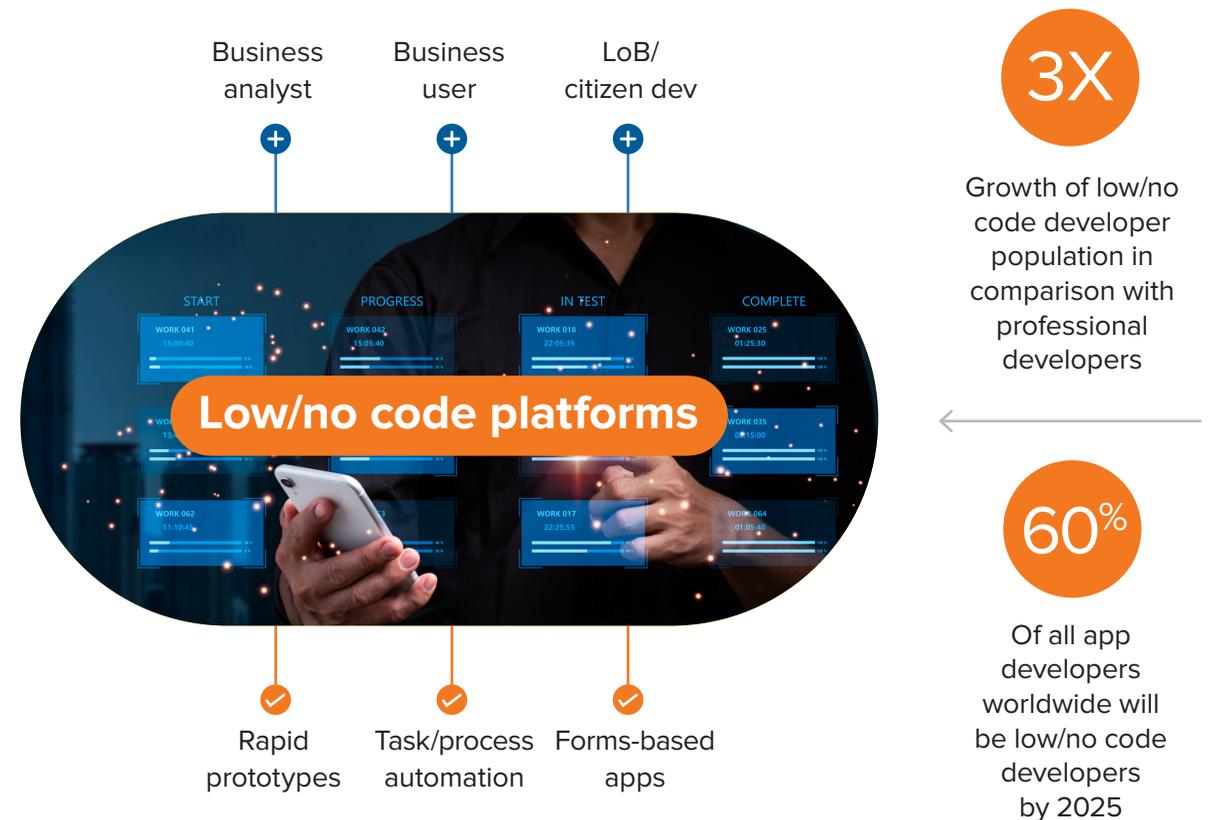
VS

APPLICATIONS

750 million

The predicted number of cloud-native applications globally by 2025 as enterprises build applications that open new revenue streams, deliver differentiated customer experiences, and improve operational efficiency.

Low/No code technologies will be key to radically expanding the developer pool **and** accelerating development velocity**.**

FIGURE 2

Path to Digital Business

Business analyst

Business user

LoB/ citizen dev

Low/no code platforms

START   PROGRESS   IN TEST   COMPLETE

Rapid prototypes

Task/process automation

Forms-based apps

3X

Growth of low/no code developer population in comparison with professional developers

60%

Of all app developers worldwide will be low/no code developers by 2025

Source: Pivot Table: *Worldwide Low-Code Developer Forecast*, 2022-2027 (IDC #US48951722), March 2022, and Pivot Table: *Worldwide No-Code Developer Forecast*, 2022-2027 (IDC #US48951922), March 2022

While enterprises are prioritising digital business, they face operational headwinds

FIGURE 3

Key Enterprise Priorities
for Continued Investment on the Path to DX

Security, risk, compliance, and governance

Infrastructure & IT operations optimisation

+

Workplace productivity solutions

Customer experience initiatives

KEY OBSERVATION

Even as enterprises chart their digital evolution, they will have an uphill task supporting key business priorities if they lack the right underlying digital foundations.

IDC > Prediction

By 2027, **40%** of A1000* will incorporate employee experience initiatives into their core CX strategies to compete in **CX**, **talent acquisition**, and **retention** but will struggle to measure EX+CX.
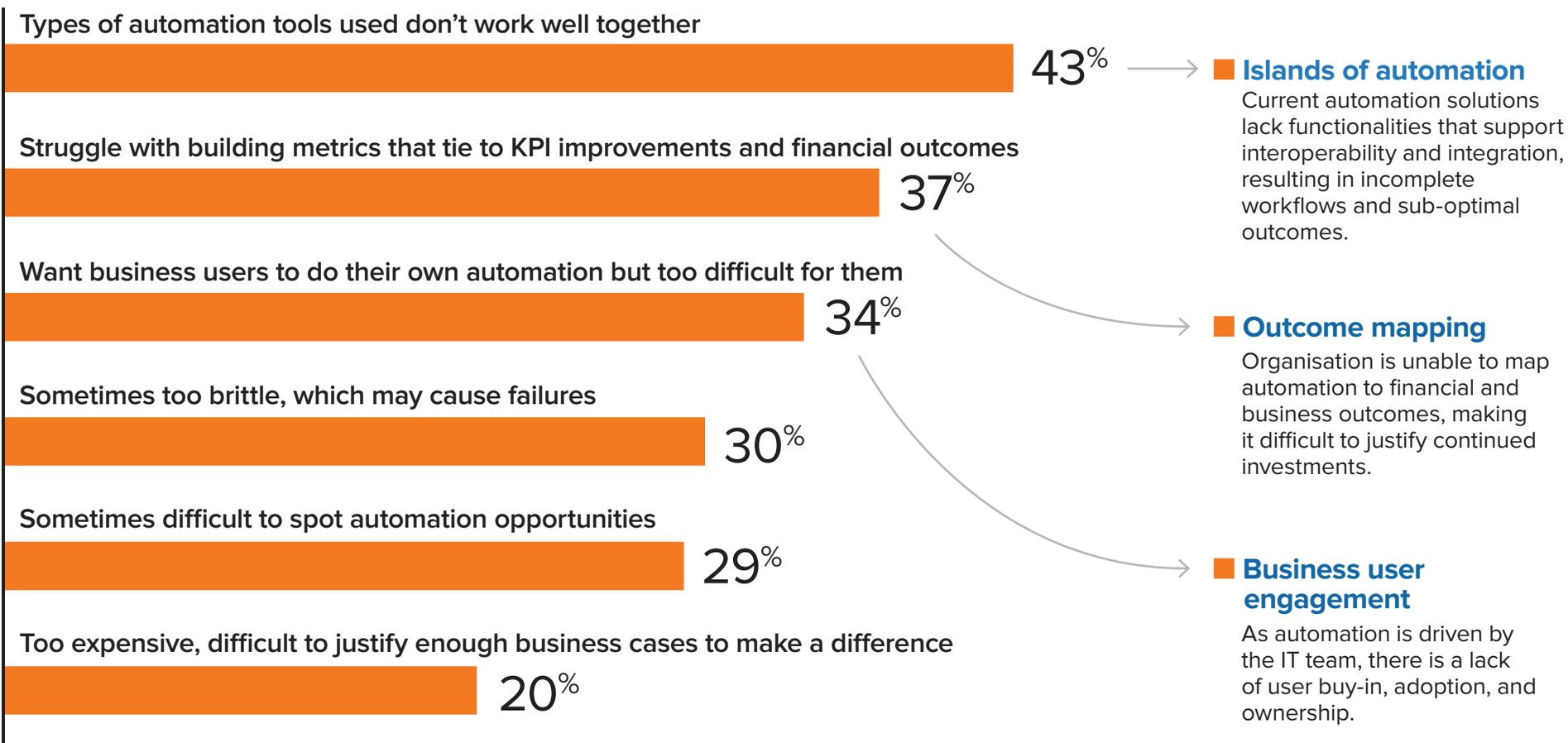
*Asia-based top 1,000 organisations

Source: IDC Future Enterprise Resiliency & Spending 2023 Survey Wave 2, March 2023 (WW n = 952)

Decoding the challenges of current automation implementations

FIGURE 4

Top Asia/Pacific enterprise challenges with automation implementation

Types of automation tools used don't work well together

43%

Struggle with building metrics that tie to KPI improvements and financial outcomes

37%

Want business users to do their own automation but too difficult for them

34%

Sometimes too brittle, which may cause failures

30%

Sometimes difficult to spot automation opportunities

29%

Too expensive, difficult to justify enough business cases to make a difference

20%

Islands of automation
Current automation solutions lack functionalities that support interoperability and integration, resulting in incomplete workflows and sub-optimal outcomes.

Outcome mapping
Organisation is unable to map automation to financial and business outcomes, making it difficult to justify continued investments.

Business user engagement
As automation is driven by the IT team, there is a lack of user buy-in, adoption, and ownership.

RESULT

Many enterprises are struggling to effectively deploy automation

No. 1
ITOps
Challenge

Insufficient automation within/ between various ITOps tools for effective pre-emption, auto-remediation, etc.[1]

36%
of Asia/Pacific enterprises have automated **less than 10%** of repetitive tasks in their software development/ engineering processes.[2]

Only
13.7%
of Asia/Pacific enterprises report that they are highly satisfied with their use of automation technologies.[3]

Source: IDC Future Enterprise Resiliency & Spending 2022 Survey Wave 8, Sep 2022 n = AP: 370

Sources: [1] IDC A/P Services Sourcing Survey 2022
[2] IDC A/P Software Survey 2022
[3] IDC FERS Survey Wave 8, 2022

How to overcome automation implementation challenges

Enterprises need to take a business-driven view of automation that has the following characteristics:

A **platform** approach that integrates disparate systems, applications, and data across the enterprise

Takes a **workflow-centric** view for end-to-end automation of complex workflows

Enables automation across **business processes, IT operations, and software development**

Provides complex **pre-built capabilities** and is easily **extensible** (even for non-traditional developer personas)

Provides a mechanism for programmatic **governance** and business value mapping

This approach allows enterprises to:

Take an integrated, enterprise-wide approach that supports automation of cross-enterprise processes and services;

Deliver exemplary experiences through automated workflows; and

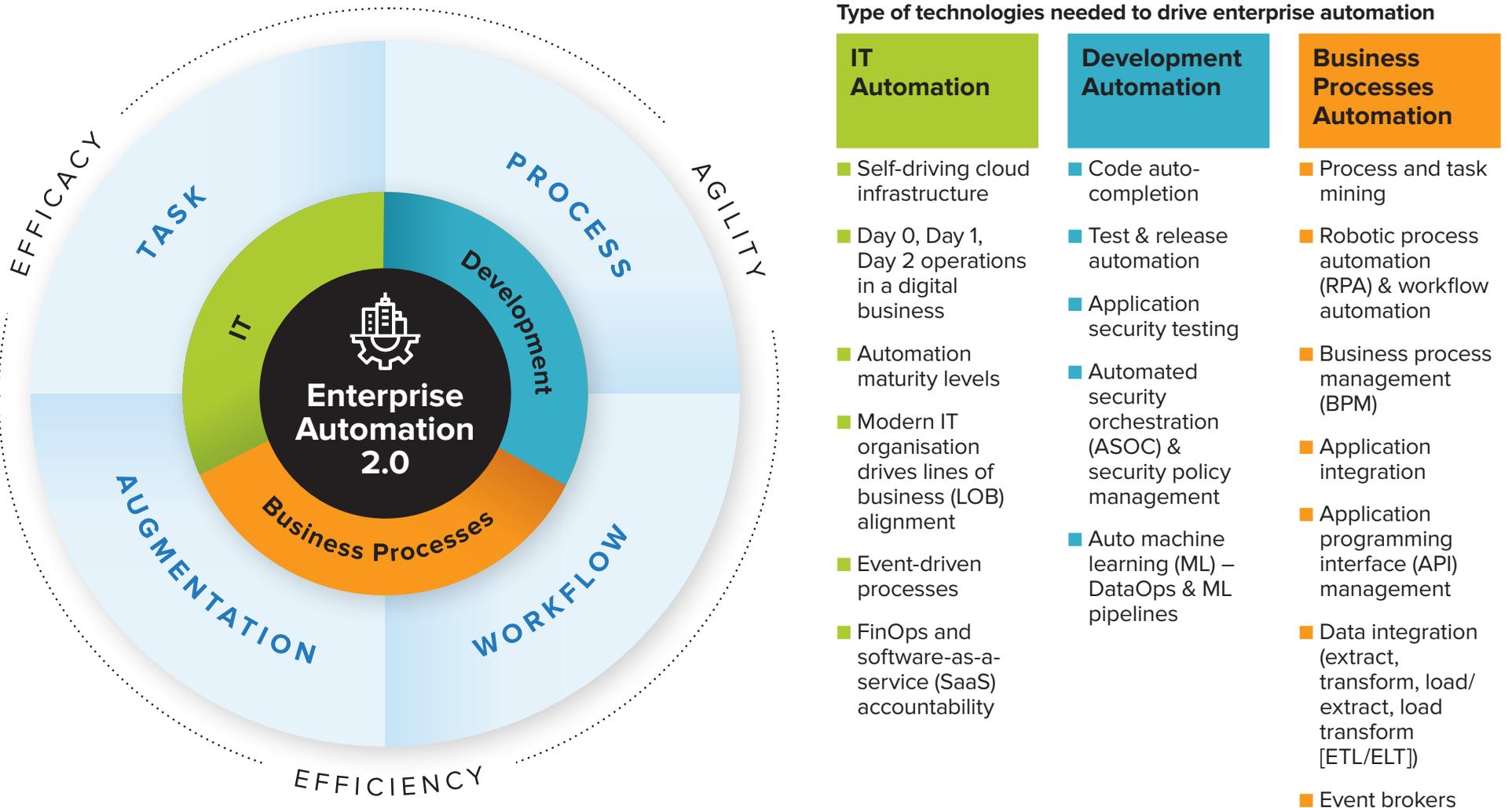Engage and co-opt employees through self-service and citizen development mechanisms.

Source: IDC Enterprise Automation Framework 2023

IDC Enterprise Automation Framework supports automation at scale

IDC's enterprise automation framework spans business processes, apps and software development, and infrastructure and IT systems.

FIGURE 5

IDC Enterprise Automation Framework

Type of technologies needed to drive enterprise automation

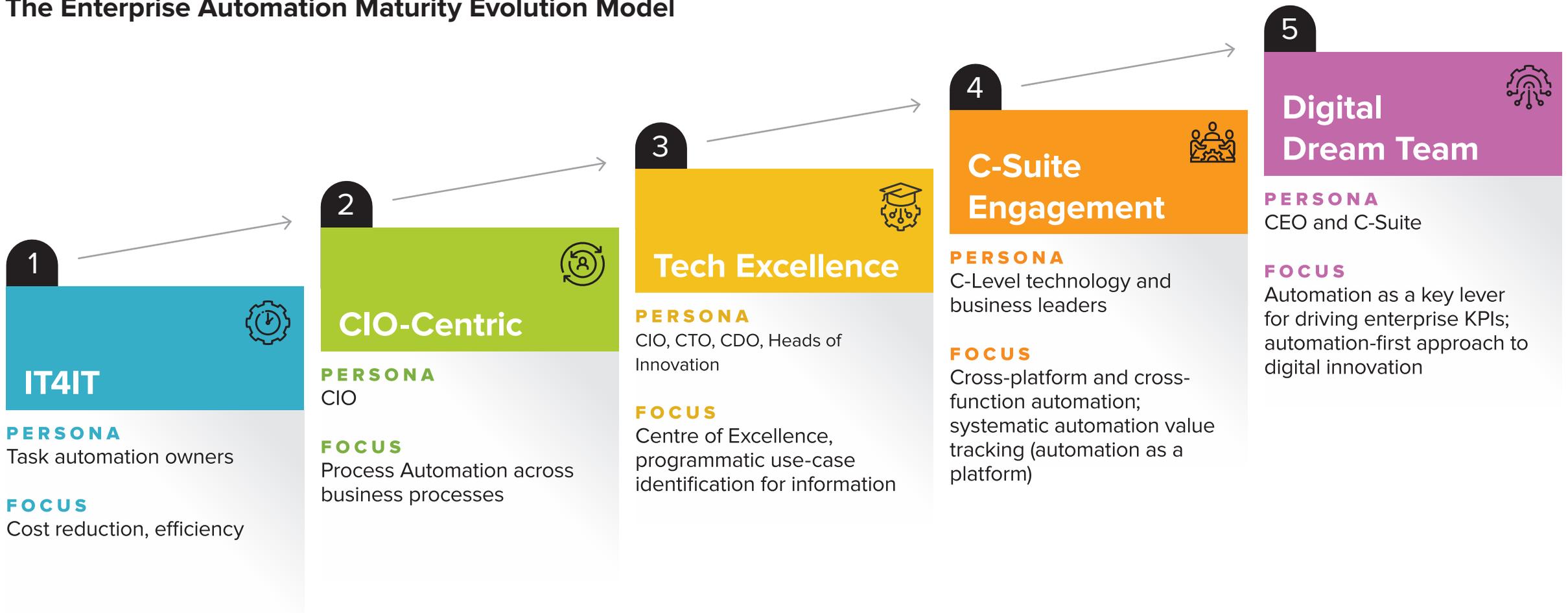| **IT Automation**	**Development Automation**	**Business Processes Automation**
■ Self-driving cloud infrastructure	■ Code auto-completion	■ Process and task mining
■ Day 0, Day 1, Day 2 operations in a digital business	■ Test & release automation	■ Robotic process automation (RPA) & workflow automation
■ Automation maturity levels	■ Application security testing	■ Business process management (BPM)
■ Modern IT organisation drives lines of business (LOB) alignment	■ Automated security orchestration (ASOC) & security policy management	■ Application integration
■ Event-driven processes	■ Auto machine learning (ML) – DataOps & ML pipelines	■ Application programming interface (API) management
■ FinOps and software-as-a-service (SaaS) accountability		■ Data integration (extract, transform, load/extract, load transform [ETL/ELT])
		■ Event brokers

Source: IDC Enterprise Automation Framework 2023

The enterprise automation journey in five steps

Organisations implementing an automation strategy typically go through a phased maturity journey, beginning with task automation driven by IT. At the aspirational end stage, a cross-functional digital dream team drives automation strategy and implementation.

The Enterprise Automation Maturity Evolution Model

1

IT4IT

PERSONA
Task automation owners

FOCUS
Cost reduction, efficiency

2

CIO-Centric

PERSONA
CIO

FOCUS
Process Automation across business processes

3

Tech Excellence

PERSONA
CIO, CTO, CDO, Heads of Innovation

FOCUS
Centre of Excellence, programmatic use-case identification for information

4

C-Suite Engagement

PERSONA
C-Level technology and business leaders

FOCUS
Cross-platform and cross-function automation; systematic automation value tracking (automation as a platform)

5

Digital Dream Team

PERSONA
CEO and C-Suite

FOCUS
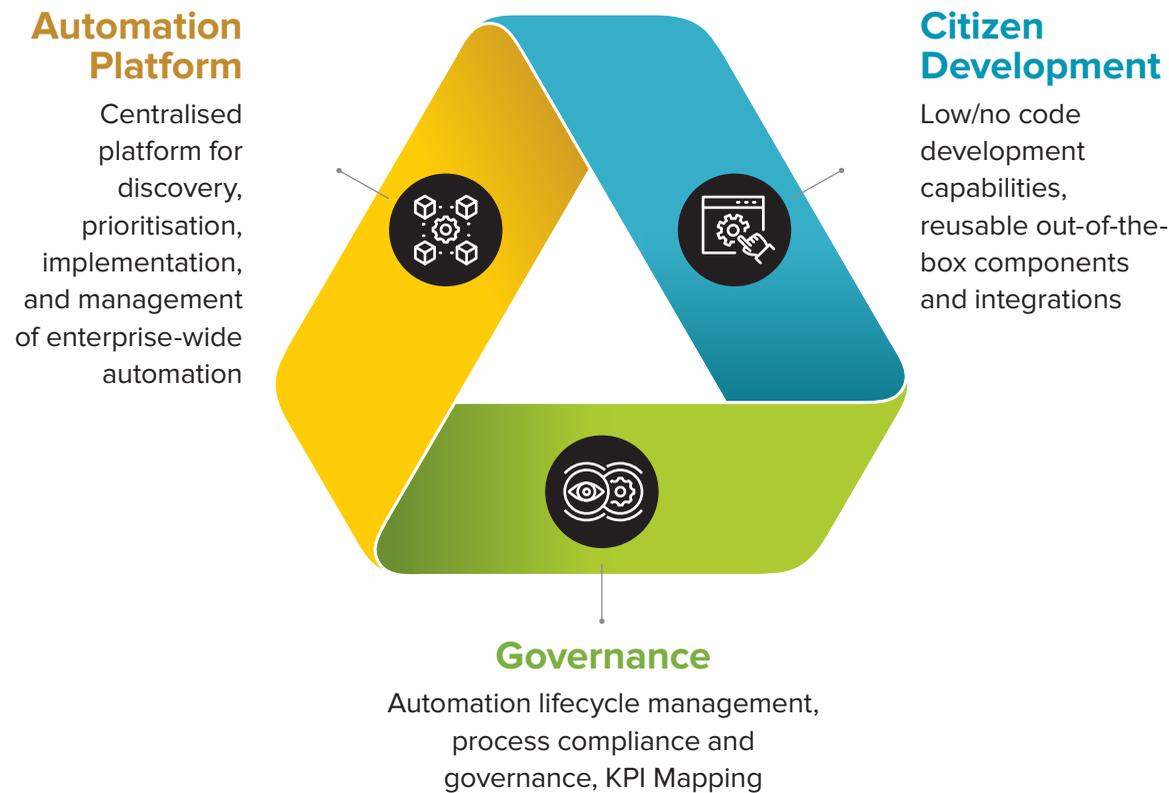Automation as a key lever for driving enterprise KPIs; automation-first approach to digital innovation

Source: IDC C-Suite Tech Agenda Research

The benefits of working with an automation platform partner

Many organisations do not possess the broad set of critical skills needed to execute an enterprise-wide, intelligent automation-driven transformation strategy. They may consider working with an enterprise automation partner to augment the needed capabilities.

FIGURE 6
Critical capabilities for enterprise automation

Automation Platform

Centralised platform for discovery, prioritisation, implementation, and management of enterprise-wide automation

Citizen Development

Low/no code development capabilities, reusable out-of-the-box components and integrations

Governance

Automation lifecycle management, process compliance and governance, KPI Mapping

What can a partner do?

✓ **Provide** an integrated, cross-silo platform (as compared to having numerous purpose-specific tools)

✓ **Enable** effective business-user participation through citizen development

✓ **Facilitate** robust governance to ensure that the objectives of initiatives are met

Positive outcomes

✓ **Enterprise automation platform**
  ■ Higher operational efficiency
  ■ Improved digital experiences

✓ **Citizen development**
  ■ Engaged workforce and smooth adoption
  ■ Accelerated development of business apps

✓ **Automation governance**
  ■ Measurable business value from automation
  ■ Sustainable and scalable enterprise automation

Essential Guidance

IDC has the following recommendations for organisations that are looking to embark on such an automation-powered journey.

KEY ACTIONS

DEFINE
- Identify desired business outcomes
- Finalise automation scope
- Conduct detailed workflow review
- Stakeholders: C-Suite/ Board; Business leaders/ SMEs

DESIGN
- Select the right automation platform and tools
- Create detailed implementation plan
- Design a robust governance structure
- Stakeholders: CTO/CIO, CISO, CDO

DEPLOY
- Select the right transformation partner
- Execute the implementation plan flawlessly
- Configure a rich low/ no code development environment
- Stakeholders: CIO, LOB Heads

EMBRACE
- Automation adoption training
- Change management
- Low/No code development skilling
- Address preliminary implementation issues
- Stakeholders: CHRO, LOB Heads, end-users

OPTIMISE
- Continuous analytics for performance improvement
- Ongoing process optimisation
- New automation opportunities
- Stakeholders: CIO, COE, end-users

BENEFITS

DEFINE
- Automation to business outcome mapping
- Robust business case development

DESIGN
- Improved project-business goal alignment
- Project risk mitigation

DEPLOY
- Business results: revenue, efficiency, productivity, etc.
- Smooth technology transition
- Increased adoption readiness

EMBRACE
- Increased business-user ownership and buy-in
- Increased efficiency/ productivity through citizen development

OPTIMISE
- Outcomes optimisation
- Identification of new automation opportunities

Enterprise Automation in Asia/Pacific
An Industry and Market Perspective

How different sectors fare in automation adoption

■ These are the **most mature** sectors for automation adoption, and should focus on optimisation and citizen development.

■ A significant proportion of these two sectors has limited automation and **needs support** to scale automation through strong governance.

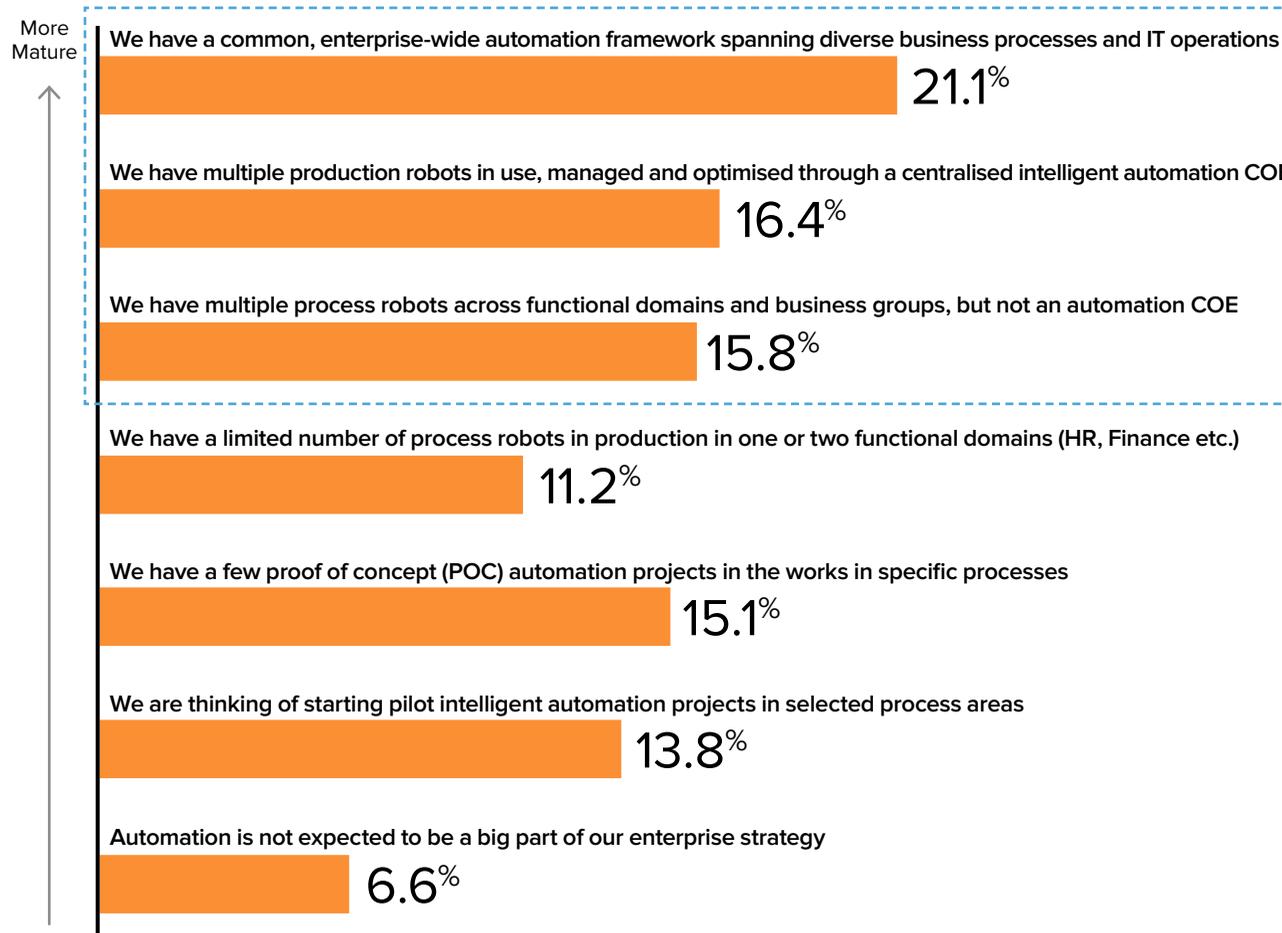■ The least mature sector and **needs guidance** on use-case led, pre-built automation.

	BFSI	MANUFACTURING	RETAIL	HEALTHCARE	GOVERNMENT
Common enterprise-wide automation framework spanning diverse business processes and IT operations	21.3%	18.4%	17.3%	14.0%	17.6%
Multiple production robots in use, managed and optimised through a centralised intelligent automation COE	18.3%	16.0%	12.5%	19.3%	5.9%
Multiple process robots across functional domains and business groups, but not an automation COE	21.3%	15.2%	13.5%	8.8%	14.7%
Limited number of process robots in production in one or two functional domains (HR, Finance etc.)	12.2%	16.8%	21.2%	22.8%	11.8%
Few proof of concept (POC) automation projects in the works in specific processes	10.7%	11.2%	14.4%	8.8%	23.5%
Starting pilot Intelligent Automation projects in selected process areas	11.7%	16.8%	15.4%	15.8%	26.5%
Automation is not expected to be a big part of enterprise strategy	4.6%	5.6%	5.8%	10.5%	0.0%

Source: IDC Asia/Pacific Enterprise Services Sourcing Survey, 2022 (Asia/Pacific N=929)
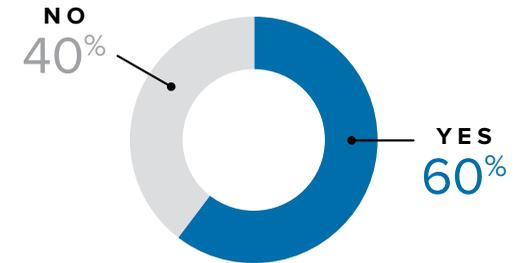
ANZ: A mature automation market with room for improvement

With almost 53% of respondents stating that their organisations have adopted automation at scale, Australia and New Zealand is one of the most mature automation markets in Asia/Pacific. A relatively high percentage – 60% – of ANZ enterprises have an enterprise automation strategy, but a sizable 30% indicate dissatisfaction with automation usage, suggesting there is room for improvement.

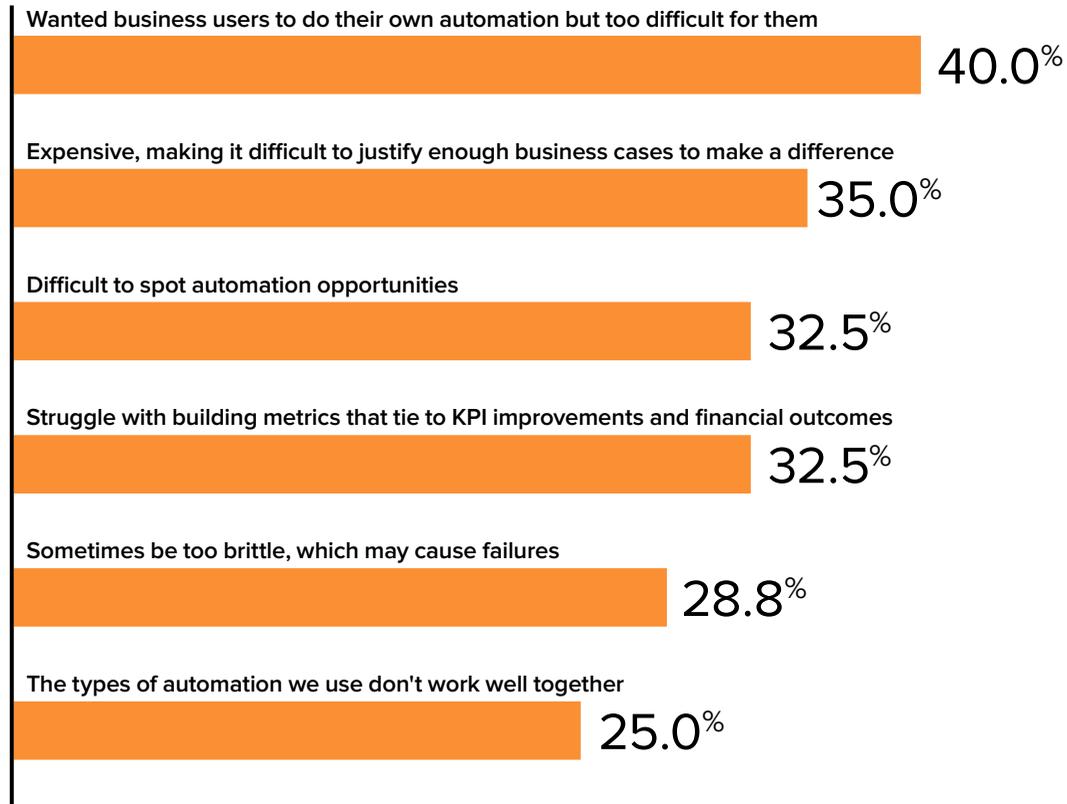## Current state of intelligent automation adoption

More Mature

We have a common, enterprise-wide automation framework spanning diverse business processes and IT operations
21.1%

We have multiple production robots in use, managed and optimised through a centralised intelligent automation COE
16.4%

We have multiple process robots across functional domains and business groups, but not an automation COE
15.8%

We have a limited number of process robots in production in one or two functional domains (HR, Finance etc.)
11.2%

We have a few proof of concept (POC) automation projects in the works in specific processes
15.1%

We are thinking of starting pilot intelligent automation projects in selected process areas
13.8%

Automation is not expected to be a big part of our enterprise strategy
6.6%

Enterprises with automation strategy

NO **40%**

YES **60%**

Satisfaction with use of automation technologies

30%
DISSATISFIED
We have not achieved the benefits we anticipated

48%
SATISFIED
We are meeting our business objectives

22%
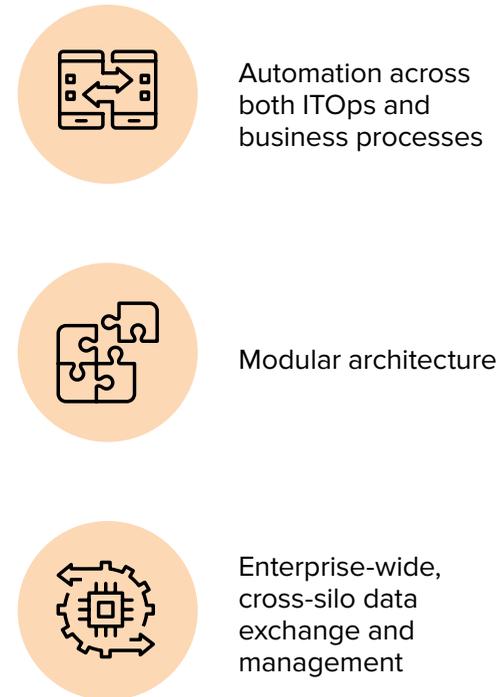**SOMEWHAT SATISFIED**
We are making progress

Source: IDC Asia/Pacific Enterprise Services Sourcing Survey, 2022 (ANZ N=152); IDC Future Enterprise Resiliency and Spending Survey 2023, Wave 1 (Jan 2023, ANZ N=30)

ANZ: The way forward

Key automation challenges

Wanted business users to do their own automation but too difficult for them

40.0%

Expensive, making it difficult to justify enough business cases to make a difference

35.0%

Difficult to spot automation opportunities

32.5%

Struggle with building metrics that tie to KPI improvements and financial outcomes

32.5%

Sometimes be too brittle, which may cause failures

28.8%

The types of automation we use don't work well together

25.0%

Top desired automation capabilities

Automation across both ITOps and business processes

Modular architecture

Enterprise-wide, cross-silo data exchange and management

Automation opportunities for ANZ Enterprises

To be successful in their automation journey, IDC recommends that ANZ enterprises seek an automation platform with the following features:
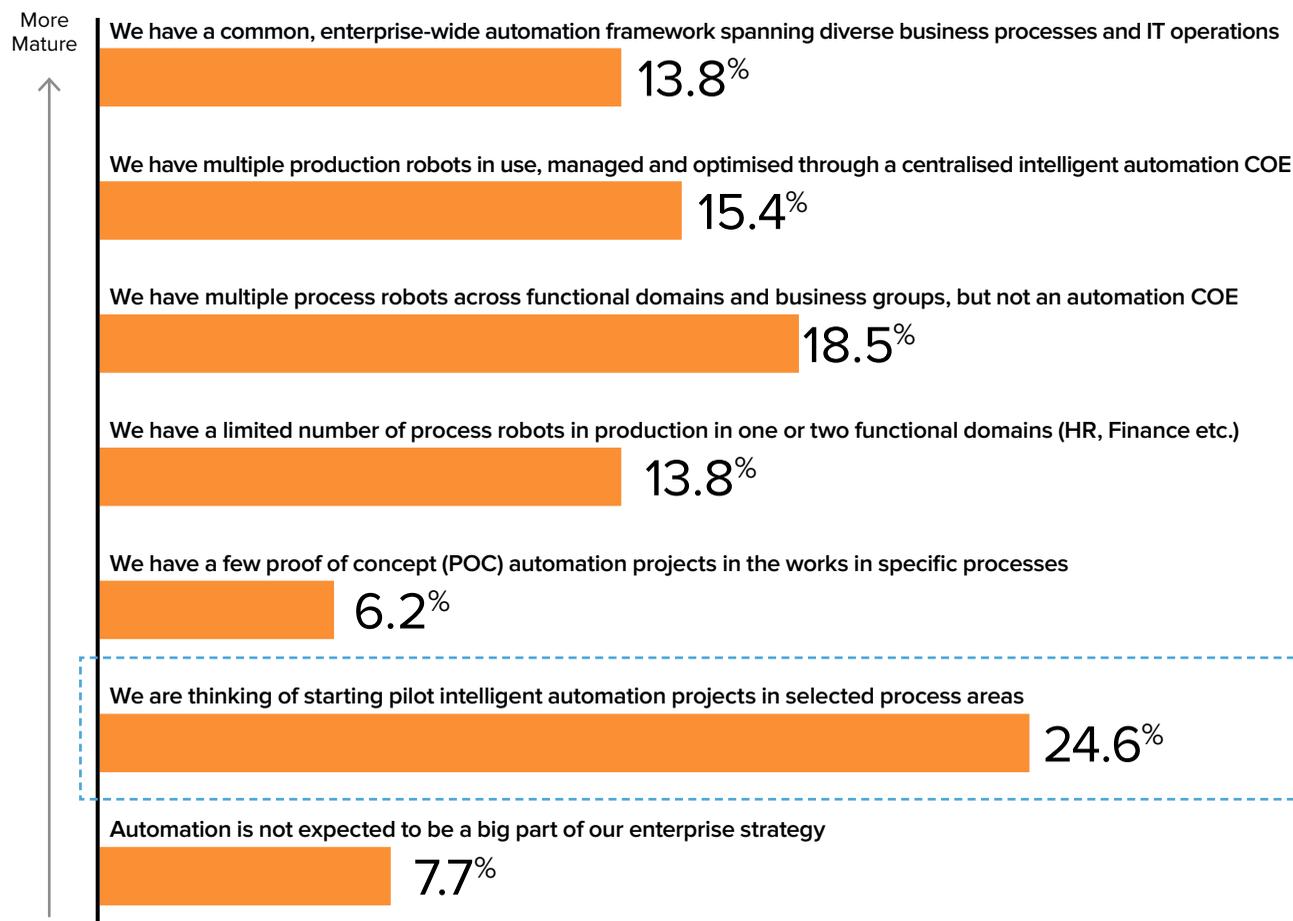
→ Provides robust **low/no code development capabilities** to support a diversity of developer personas (including citizen developers). Ensure that the provider has requisite assets for workforce skilling and change management.

→ Prioritises strong **governance and value mapping capabilities** that can help tie automation actions to business outcomes. This will help build business justification for additional spend and investment.

→ Supports **cross-silo automation** across both IT operations and business process
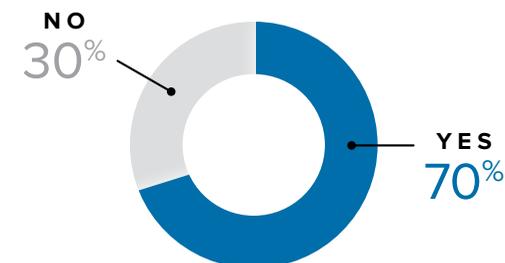
Japan: A significant portion of enterprises has low automation usage

Almost a quarter of Japan respondents were still considering automation pilots in select areas, indicating a significant population of enterprises with low automation usage and maturity. A high percentage of enterprises - 70% – indicate that they have an enterprise automation strategy, but a major concern is that 36% of respondents indicate dissatisfaction with their automation usage.

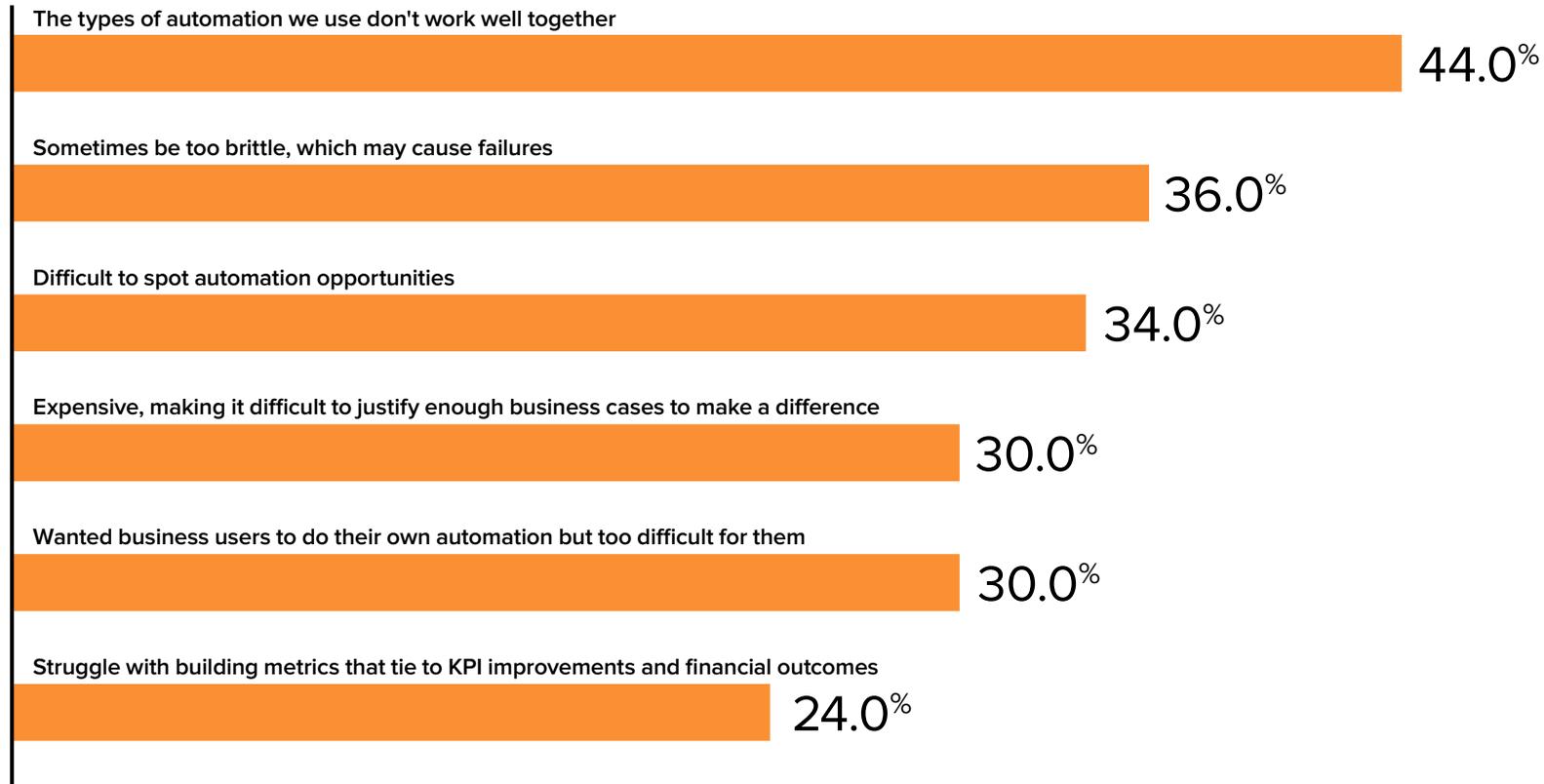## Current state of intelligent automation adoption

More Mature

We have a common, enterprise-wide automation framework spanning diverse business processes and IT operations
13.8%

We have multiple production robots in use, managed and optimised through a centralised intelligent automation COE
15.4%

We have multiple process robots across functional domains and business groups, but not an automation COE
18.5%

We have a limited number of process robots in production in one or two functional domains (HR, Finance etc.)
13.8%

We have a few proof of concept (POC) automation projects in the works in specific processes
6.2%

We are thinking of starting pilot intelligent automation projects in selected process areas
24.6%

Automation is not expected to be a big part of our enterprise strategy
7.7%

Enterprises with automation strategy

NO **30**%

YES **70**%

Satisfaction with use of automation technologies

36%
DISSATISFIED
We have not achieved the benefits we anticipated

56%
SATISFIED
We are meeting our business objectives

8%
SOMEWHAT SATISFIED
We are making progress

Japan: The way forward

Key automation challenges

The types of automation we use don't work well together

44.0%

Sometimes be too brittle, which may cause failures

36.0%

Difficult to spot automation opportunities

34.0%

Expensive, making it difficult to justify enough business cases to make a difference

30.0%

Wanted business users to do their own automation but too difficult for them

30.0%

Struggle with building metrics that tie to KPI improvements and financial outcomes

24.0%

Automation opportunities for Japan enterprises

To be successful in their automation journey, IDC recommends that Japan enterprises seek an automation platform with these features:
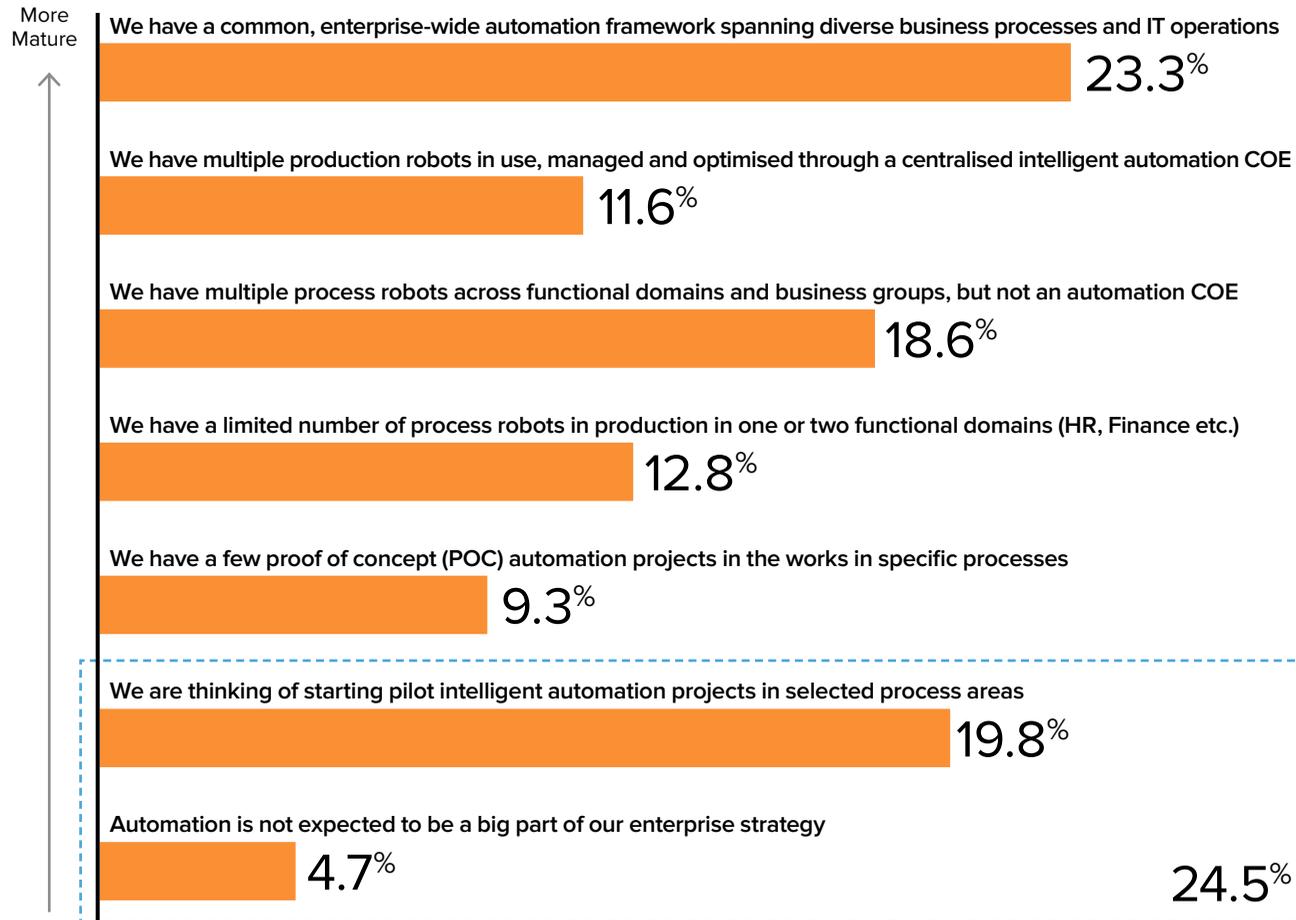
→ Brings together disparate enterprise systems, apps, and data to enable seamless end-to-end automation of enterprise workflows to overcome interoperability and "duct-tape automation" challenges.

→ Provides curated, pre-built templates for easy, use-case driven automation implementation.

→ Has a robust governance mechanism and tools to encourage business users to identify automation opportunities in their regular work.

Source: IDC Future Enterprise Resiliency and Spending Survey 2022, Wave 8 (Japan N=50)
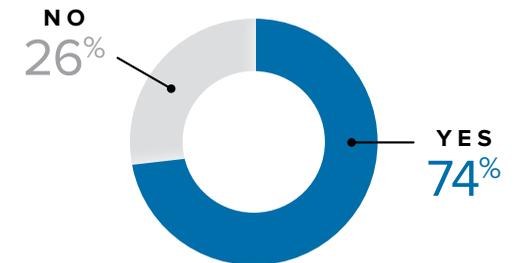
India: A diverse and uneven automation market

Three quarters (74%) of Indian enterprises surveyed indicated they had an automation strategy, but about 38% indicated dissatisfaction with their automation usage presenting a serious challenge. Indian enterprises appear to be distributed across the entire spectrum of automation maturity, indicating a very heterogenous and uneven market. Approximately 25% of the market is at the beginning of its automation journey.

Current state of intelligent automation adoption

More Mature

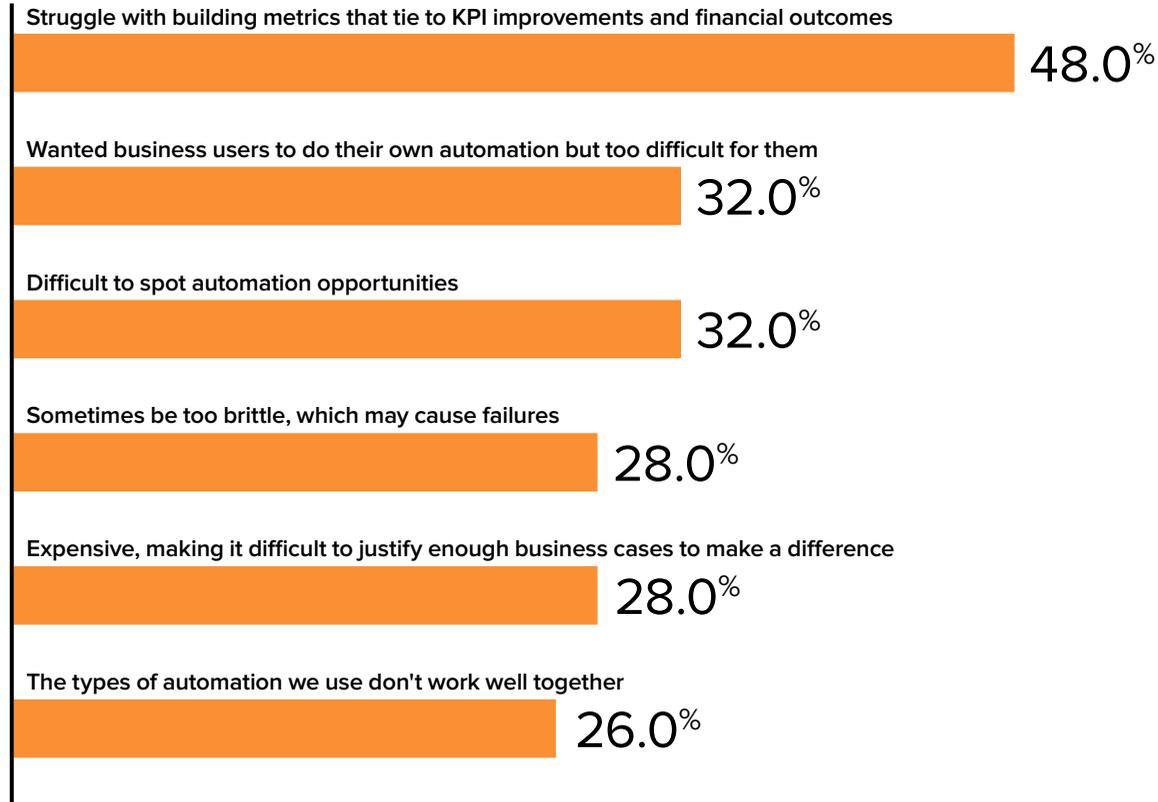We have a common, enterprise-wide automation framework spanning diverse business processes and IT operations
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9.3%

We are thinking of starting pilot intelligent automation projects in selected process areas
19.8%

Automation is not expected to be a big part of our enterprise strategy
4.7%

24.5%

Enterprises with automation strategy

NO
26%

YES
74%

Satisfaction with use of automation technologies

38%
DISSATISFIED
We have not achieved the benefits we anticipated

40%
SATISFIED
We are meeting our business objectives

22%
SOMEWHAT SATISFIED
We are making progress

India: The way forward

Key automation challenges

Struggle with building metrics that tie to KPI improvements and financial outcomes

48.0%

Wanted business users to do their own automation but too difficult for them

32.0%

Difficult to spot automation opportunities

32.0%

Sometimes be too brittle, which may cause failures

28.0%

Expensive, making it difficult to justify enough business cases to make a difference

28.0%

The types of automation we use don't work well together

26.0%

Top desired automation capabilities

Out-of-the-box third-party integrations

Traceability, compliance, and governance

Diverse deployment models and pricing options

Automation opportunities for India enterprises

To be successful in their automation journey, IDC recommends that India enterprises seek an automation platform with these features:
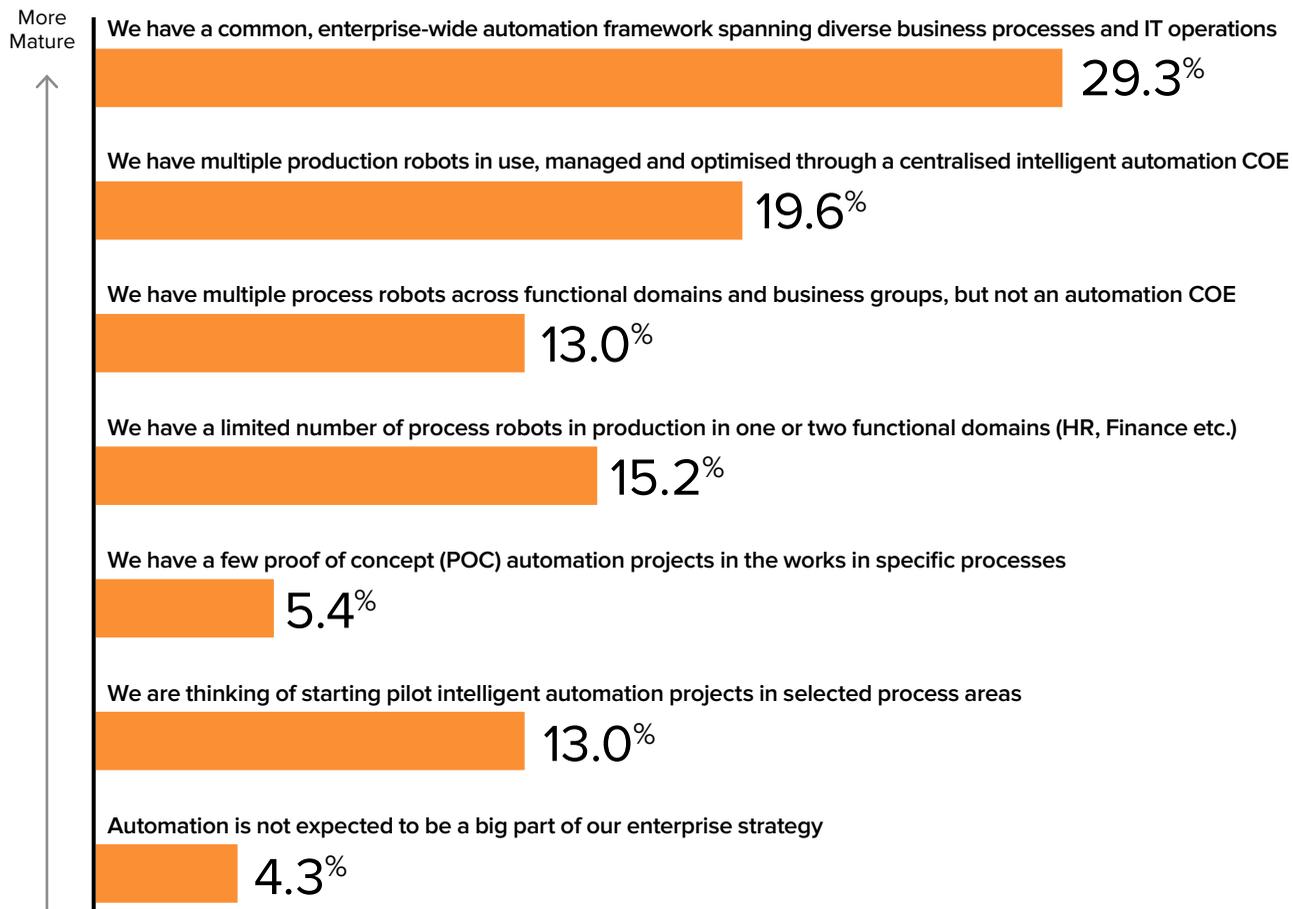
→ Provides strong value mapping capabilities (visualisation, dashboarding and analytics) that can help tie automation actions to business outcomes.

→ Has robust low/no code development capabilities to support a diversity of developer personas (including citizen developers). Ensure that the platform provider has requisite assets to support workforce skilling and change management initiatives

→ Provides comprehensive collection of out-of-the-box, pre-built connectors and integration assets to 3rd party applications for easy and rapid automation implementation

# Singapore: Mature users aspiring to scale automation

Singapore enterprises are, on average, highly mature automation users looking to scale automation use and build complex automation solutions.

Current state of intelligent automation adoption

More Mature

We have a common, enterprise-wide automation framework spanning diverse business processes and IT operations
29.3%

We have multiple production robots in use, managed and optimised through a centralised intelligent automation COE
19.6%

We have multiple process robots across functional domains and business groups, but not an automation COE
13.0%

We have a limited number of process robots in production in one or two functional domains (HR, Finance etc.)
15.2%

We have a few proof of concept (POC) automation projects in the works in specific processes
5.4%

We are thinking of starting pilot intelligent automation projects in selected process areas
13.0%

Automation is not expected to be a big part of our enterprise strategy
4.3%

Source: IDC Asia/Pacific Enterprise Services Sourcing Survey 2022 (Singapore N=92)

Top capabilities enterprises look for in an automation solution
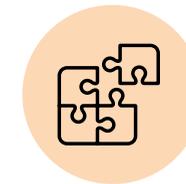
Modular architecture

Automation across both ITOps and business processes

Robust built-in assurance and environment security

The Way Forward

Automation opportunities for Singapore enterprises

To be successful in their automation journey, IDC recommends that Singapore enterprises seek an automation platform with these features:
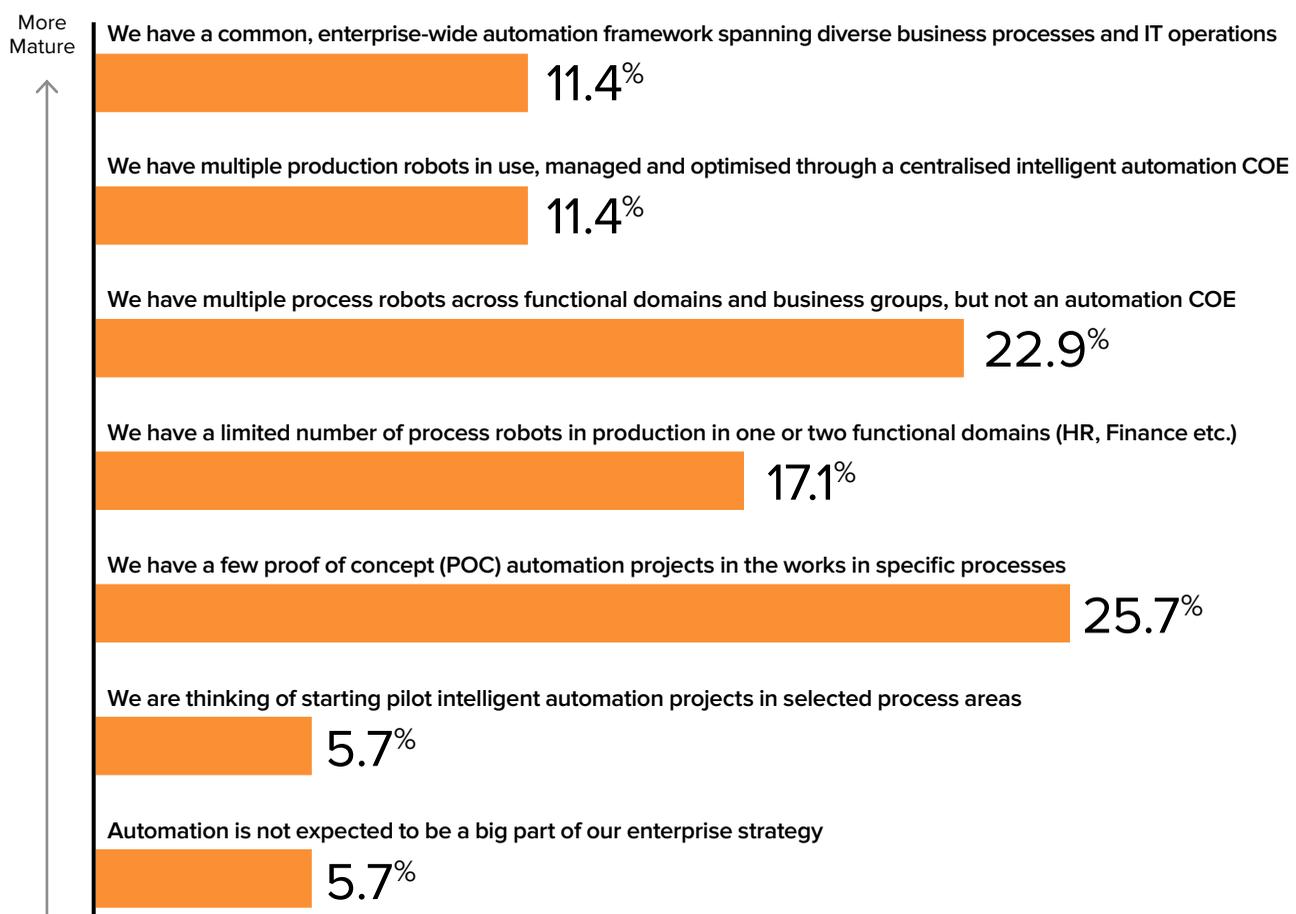
→ Ability to provide effective automation management and governance at scale

→ Have a modular architecture that allows a mix-and-match approach to building custom-made and complex automation

→ Allows automation across both business processes and IT Ops for use-cases that straddle domains

Source: IDC APEJ Enterprise Software Survey 2022 (Singapore N=50)

Hong Kong: Halfway there

Hong Kong enterprises are mostly in the mid stages of automation maturity and need support to improve automation adoption and build scale.

Current state of intelligent automation adoption

More Mature

We have a common, enterprise-wide automation framework spanning diverse business processes and IT operations
11.4%

We have multiple production robots in use, managed and optimised through a centralised intelligent automation COE
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We have a limited number of process robots in production in one or two functional domains (HR, Finance etc.)
17.1%

We have a few proof of concept (POC) automation projects in the works in specific processes
25.7%

We are thinking of starting pilot intelligent automation projects in selected process areas
5.7%

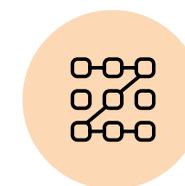Automation is not expected to be a big part of our enterprise strategy
5.7%

Source: IDC Asia/Pacific Enterprise Services Sourcing Survey 2022 (Hong Kong N=35)

Top capabilities enterprises look for in an automation solution

Traceability, compliance, and governance

Rich library of reusable components

Low code/ no code development

The Way Forward

Automation opportunities for Hong Kong enterprises

To be successful in their automation journey, IDC recommends that Hong Kong enterprises seek an automation platform with these features:
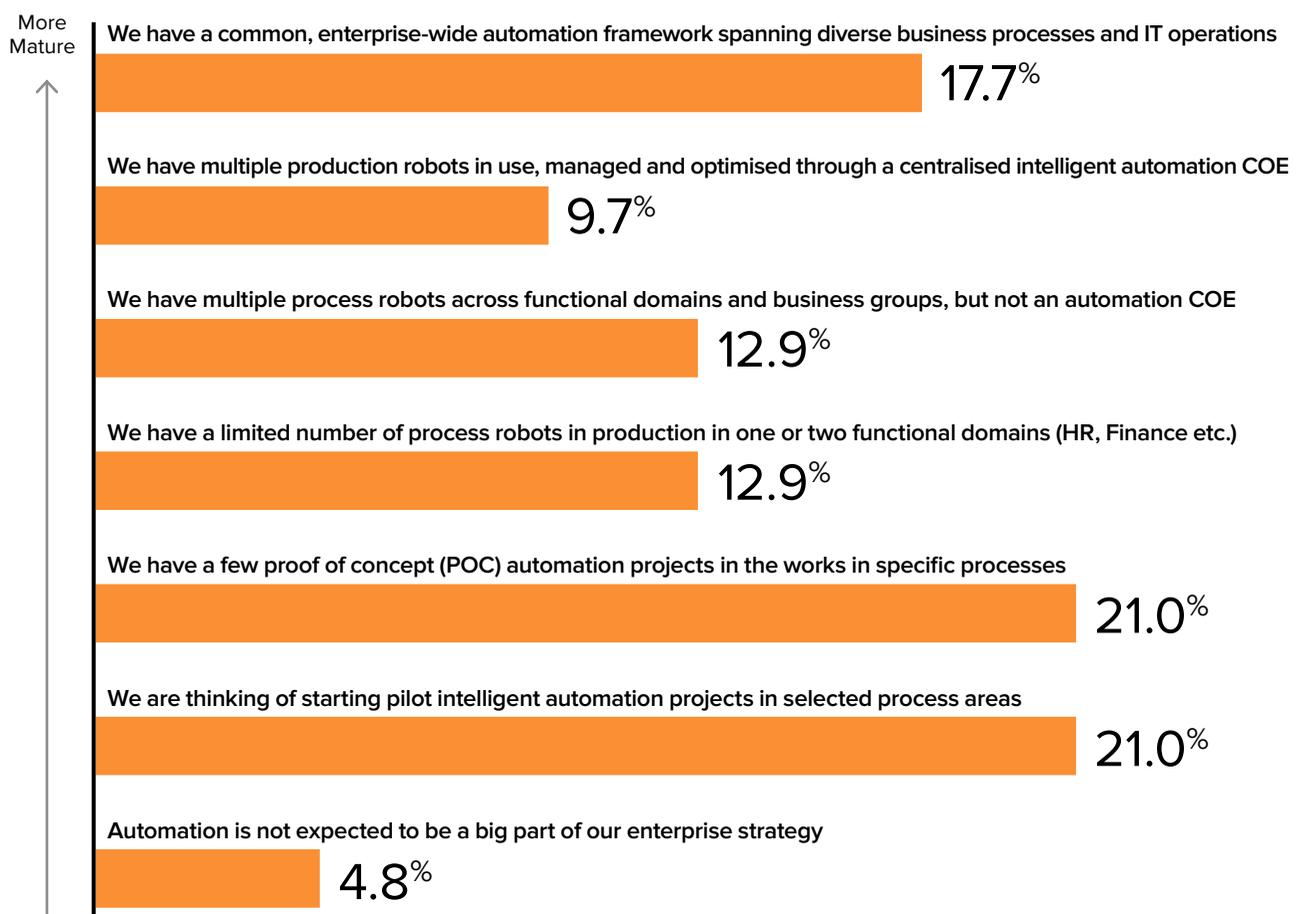
→ Traceability, compliance, and governance for a market dominated by a highly regulated BFSI sector

→ Reusable components (templates, connectors, pre-built use-cases, etc.) to accelerate automation adoption

→ Low/no code capabilities to encourage citizen development and mitigate talent availability issues

Source: IDC APEJ Enterprise Software Survey, 2022 (Hong Kong N=50)

Thailand: A market with potential

The Thailand market is still in the early stages of automation maturity, and there are vast opportunities for enterprises to accelerate the adoption of automation technology.

Current state of intelligent automation adoption

More Mature ↑

We have a common, enterprise-wide automation framework spanning diverse business processes and IT operations
17.7%

We have multiple production robots in use, managed and optimised through a centralised intelligent automation COE
9.7%

We have multiple process robots across functional domains and business groups, but not an automation COE
12.9%

We have a limited number of process robots in production in one or two functional domains (HR, Finance etc.)
12.9%

We have a few proof of concept (POC) automation projects in the works in specific processes
21.0%

We are thinking of starting pilot intelligent automation projects in selected process areas
21.0%

Automation is not expected to be a big part of our enterprise strategy
4.8%

Source: IDC Asia/Pacific Enterprise Services Sourcing Survey 2022 (Thailand N=62)

Top capabilities enterprises look for in an automation solution
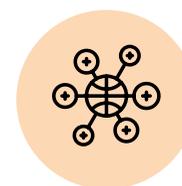
Wide range of deployment models/ pricing options

Automation across both IT Ops & business processes

Low code/ no code development

The Way Forward

Automation opportunities for Thailand enterprises

To be successful in their automation journey, IDC recommends that Thai enterprises seek an automation platform with these features:

→ Business case development/ROI tools, proof of concept (POC), pre-built use-cases, etc. to help enterprises at the early stages of their automation journey

→ Wide range of deployment models/pricing options to make it attractive for enterprises to begin their automation journey on their terms

→ Common automation framework across business processes and IT for enterprises taking a holistic approach to automation

Source: IDC APEJ Enterprise Software Survey 2022 (Thailand N=50)

# Malaysia: A heterogeneous automation market

The Malaysia automation market is a mixed one with enterprises across the spectrum of the automation maturity curve.

Current state of intelligent automation adoption

More Mature ↑

We have a common, enterprise-wide automation framework spanning diverse business processes and IT operations
10.9%

We have multiple production robots in use, managed and optimised through a centralised intelligent automation COE
20.3%

We have multiple process robots across functional domains and business groups, but not an automation COE
12.5%

We have a limited number of process robots in production in one or two functional domains (HR, Finance etc.)
20.3%

We have a few proof of concept (POC) automation projects in the works in specific processes
10.9%

We are thinking of starting pilot intelligent automation projects in selected process areas
17.2%

Automation is not expected to be a big part of our enterprise strategy
7.8%

Source: IDC Asia/Pacific Enterprise Services Sourcing Survey 2022 (Malaysia N=64)

Top capabilities enterprises look for in an automation solution
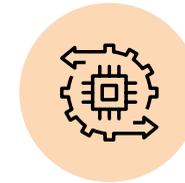
Common, cross-silo data management layer

Robust built-in assurance and environment security
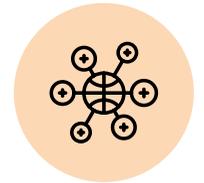
Wide range of deployment models/ pricing options

The Way Forward

Automation opportunities for Malaysia enterprises

To be successful in their automation journey, IDC recommends that Malaysia enterprises seek an automation platform with these features:

→ Wide range of deployment models/pricing options to make it attractive for enterprises to begin their automation journey.

→ Robust, cross-silo data management capabilities for automating data processing centric back-office processes.

→ For mature automation users, the ability to provide effective automation management and governance at scale.

Source: IDC APEJ Enterprise Software Survey, 2022 (Malaysia N=50)

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