



● Point of View

AI in Outsourcing: The strategic reality beyond the hype

A comprehensive Point of View on digital
workforce integration and contract
transformation

eraneos



Executive Summary

The outsourcing industry stands at a critical inflection point. While artificial intelligence (AI) promises to revolutionize how organizations delegate complex cognitive work, the reality of implementation, economics, and contract dynamics differs significantly from popular assumptions. This comprehensive analysis examines the genuine opportunities and challenges of AI-powered outsourcing, providing fact-based insights for strategic decision-making.

Our research reveals that while AI is indeed transforming outsourcing capabilities, successful implementation requires sophisticated governance, realistic expectations, and strategic contract restructuring. Companies that approach this transformation with clear-eyed analysis rather than hype-driven assumptions will capture the greatest value.

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Chapter 1

The evolution from automation to intelligence



The evolution of outsourcing:
Overview on historical
industry milestones

- **1990s: Basic Outsourcing**
Manual, standardized tasks relocated offshore for cost savings
- **2000s: BPO / Offshoring Expansion**
Broader business processes sourced globally; emphasis on SLA-driven delivery
- **2010s: RPA & Knowledge Automation**
RPA automates repetitive, rule-based tasks, reducing human involvement in routine operations within BPO
- **2015s: Digital Transformation in BPO**
Outsourcers adopt cloud platforms, analytics, and workflow digitization to deliver services
- **2018s: Cognitive Process Automation**
Introduction of AI for semi-automated case handling, inquiry resolution, and compliance checks
- **2020s: Smart BPO Delivery**
AI handles complex interactions such as claims processing; BPO shifts towards offering cognitive services
- **2023+: Human-AI Collaboration Models**
Outsourcers blend AI with human teams for managed services (eg. hybrid contact centers)
- **2026+: Ecosystem-Integrated Outsourcing**
Next-gen outsourcing integrates federated AI agents across client systems, hyperautomation becomes an outsourcing differentiator

The fundamental shift

For decades, traditional outsourcing models focused on transferring standardized, labor-intensive work to lower-cost providers, primarily leveraging human resources across geographies. However, over the past 15 years, outsourcing has increasingly integrated digitalization, analytics, and automation - moving beyond purely manual labor arbitrage. The emergence of AI agents marks a substantive shift, allowing the automation of more complex and variable tasks, with greater contextual understanding and decision support than previous generations of rules-based automation tools.

Modern AI agents can process ambiguous inputs, coordinate multi-step workflows, and support cognitive functions within business processes. Although fully autonomous reasoning and end-to-end orchestration remain technologically nascent, progress toward adaptive, context-aware automation is accelerating.

Strategically, this shift requires organizations to redesign workflows and skill models. Contrary to earlier forecasts of rapid, large-scale job displacement and creation, recent labor market research suggests that the impact of AI and automation is more nuanced and gradual. OECD and IDC analyses show that most organizations are experiencing workforce transformation through augmentation and hybridization of roles, with fewer cases of mass job displacement or outright net new job creation.

Current market adoption

Enterprise adoption of AI agents in business processes has accelerated significantly. Gartner's research indicates that by 2027, AI agents will handle over 40% of customer service interactions, representing a dramatic increase from less than 5% in 2021. This growth reflects not just technological advancement, but genuine business value creation through improved efficiency, consistency, and scalability.

The financial services sector leads adoption, with major institutions deploying AI agents for document processing, compliance monitoring, and customer service. Manufacturing follows closely, utilizing AI agents for quality control, supply chain optimization, and predictive maintenance. These early implementations provide valuable insights into both the potential and limitations of AI-powered outsourcing models.

Chapter 2

Real-world implementation evidence

Banking and Financial Services

Deutsche Bank's implementation of AI agents for Know Your Customer (KYC) and compliance processes demonstrates the practical application of cognitive outsourcing. These agents process complex regulatory documents, identify potential compliance issues, and flag anomalies for human review. The implementation resulted in processing time improvements exceeding 50% while reducing regulatory error rates, according to the bank's 2023 annual report.

The success factors in Deutsche Bank's deployment included comprehensive data governance, clear escalation protocols, and continuous monitoring systems. The bank invested significantly in training data quality and established robust audit trails for regulatory compliance. This implementation illustrates that successful AI agent deployment requires substantial upfront investment in governance and infrastructure, challenging assumptions about immediate cost savings.

ING Group's "Inge" AI assistant represents another significant deployment in financial services. This agent handles loan application processing, document verification, and customer communication throughout the approval process. The system processes mortgage applications with sophistication comparable to experienced loan officers, analyzing financial documents, assessing creditworthiness, and explaining decisions in natural language. ING reported 60% faster processing times and 40% reduction in application abandonment rates following implementation.

AI adoption rates by top 5 industries
(Gartner, "AI Adoption in Enterprises by Industry", 2024)

Industry	Adoption Rate	Outsourcing Impact
Financial Services	31%	High (process automation, fraud detection, customer support)
Retail / e-Commerce	29%	High (inventory, personalization, chat, logistics)
Telecommunications	27%	High (call center automation, predictive analytics)
Healthcare	23%	Moderate (document automation, scheduling, diagnostics pilots)
Manufacturing	20%	Moderate (quality control, supply chain, robotics pilots)

Manufacturing and Industrial Applications

Siemens Energy's deployment of AI agents in procurement processes showcases industrial applications of cognitive outsourcing. These agents manage supplier negotiations, contract reviews, and purchase order processing across the company's global operations. The implementation processes over 1.5 million procurement transactions annually, with AI agents handling initial negotiations and contract analysis before escalating complex cases to human specialists.

The results demonstrate significant operational improvements: procurement cycle times decreased by 30%, while processing costs per transaction fell substantially. However, the implementation required 18 months and significant investment in system integration and staff retraining. Siemens Energy's experience illustrates both the potential and complexity of AI agent deployment in enterprise environments.

BMW Group's application of AI agents in quality assurance represents another industrial use case. These agents analyze production line data, identify potential defects, and coordinate corrective actions across manufacturing systems. The implementation improved quality metrics by 25% while enabling human workers to focus on complex problem-solving and process optimization. BMW's approach demonstrates successful human-AI collaboration rather than simple replacement of human workers.

Logistics and Supply Chain

Maersk's deployment of AI agents for logistics orchestration provides insights into supply chain applications. These agents manage end-to-end shipment coordination, including customs documentation, warehouse allocation, and exception handling. When disruptions occur, such as port delays or weather events, agents automatically trigger alternative logistics routes and communicate changes to affected stakeholders.

The implementation handles millions of shipments annually, with agents processing routine coordination tasks while escalating complex issues to human specialists. Maersk reported 30% reduction in logistics coordination costs and 50% faster exception resolution following deployment. The success required extensive integration with existing systems and careful design of human oversight mechanisms.

“Enterprises implementing AI agents achieve average cost reductions of 35-50% compared to traditional outsourcing models over three-year periods, but only after significant upfront investment and organizational change.”

IDC, “AI-Powered Business Process Transformation” (2024)



Chapter 3

Economic analysis and cost structures

Understanding true costs

The economics of AI agent deployment differ significantly from traditional outsourcing models. While conventional outsourcing achieves cost reductions through labor arbitrage, AI agents require technology investments and introduce ongoing operational costs that scale with usage rather than headcount.

IDC's 2024 research on AI-powered business process transformation indicates that enterprises implementing AI agents achieve average cost reductions of 35–50% compared to traditional outsourcing models over three-year periods. However, these savings typically materialize in the second and third years, as the first year often incurs increased costs due to development, integration, and organizational change.

It is important to note that, compared to earlier phases of AI adoption, organizations today increasingly rely on pre-trained large language models and "AI-as-a-Service" offerings from major tech companies (such as OpenAI or Google). This significantly reduces the need to invest in building or training AI models from scratch, often accelerating implementation and reducing initial costs. Nevertheless, substantial expenses can remain for model integration, customization, cloud-based usage fees, and especially for data preparation and ongoing data quality management. Moreover, staff retraining and new role development add additional costs as organizations adapt to human-AI collaborative workflows.

In summary, while the up-front investment structure is changing - and in many cases being reduced thanks to reusable AI platforms - organizations must account for recurring costs and ensure a balanced assessment of total cost of ownership.

Investment requirements and payback periods

HfS Research's 2024 analysis of enterprise AI implementations reveals that successful AI agent deployments typically require \$2-8 million in upfront investments for enterprise-scale applications. These investments cover technology platforms, system integration, data preparation, and organizational change management. Implementation timelines typically span 12-24 months for full deployment and optimization.

The payback period varies significantly by application and organizational maturity. Simple, high-volume processes such as document processing or basic customer service may achieve positive returns within 12-18 months. Complex applications requiring extensive integration and customization may require 24-36 months to achieve full return on investment.

Organizations with existing digital infrastructure and data management capabilities typically achieve faster implementation and earlier returns. Companies lacking these foundational elements often face extended implementation periods and higher total costs. This reality challenges assumptions that AI agents provide immediate cost relief for all organizations.

Scaling economics

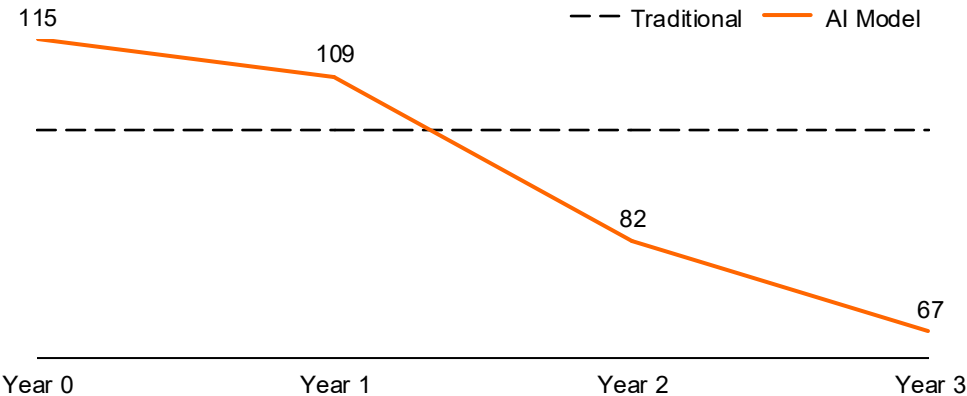
AI agents offer unique scaling characteristics compared to traditional outsourcing. Once implemented, agents can handle volume increases without proportional cost increases, providing significant advantages during peak demand periods. However, this scalability requires robust underlying infrastructure and careful capacity planning.

The marginal cost of additional AI agent capacity typically involves cloud computing resources and data processing, which scale more predictably than human resources. This characteristic enables organizations to handle seasonal fluctuations or business growth without the lead times and fixed costs associated with traditional outsourcing expansion.

However, scaling also introduces complexity in governance, monitoring, and quality assurance. Organizations must invest in systems and processes to manage larger AI agent deployments effectively. The total cost of ownership includes these governance and oversight requirements, which increase with scale and complexity.

Average cost reduction timeline of traditional outsourcing vs. AI models

Year-on-Year Average Enterprise Cost (100 = Baseline Traditional Outsourcing Cost)





Chapter 4

The contract renegotiation reality

Market power dynamics

Assumptions that clients can simply force immediate cost reductions from outsourcing providers through AI adoption are proving to be only partially true. According to Everest Group and ISG, established BPO providers have often retained strong negotiating positions - particularly with midsize and less mature clients - by leveraging their proprietary AI platforms, implementation experience, and economies of scale. While many outsourcing buyers expect rapid cost benefits, most initial contracts with embedded AI capabilities have not delivered substantial cost reductions to clients, especially in the first contract cycles.

Market evidence suggests that leading providers are seeking to increase margins on AI-enabled contracts, both to recoup their technology investments and to reflect the value of proprietary automation capabilities. However, precise profit margin figures are not publicly disclosed and may vary significantly. Industry analysts such as Gartner and Everest confirm that some clients, particularly larger or more technologically sophisticated ones, have successfully negotiated cost savings or performance-based benefit-sharing when they proactively structured contract terms.

Contract structure realities

ISG's review of outsourcing contracts indicates that the majority of agreements signed before 2023 do not guarantee clients access to technology-driven cost savings. Common contract provisions include baseline service level guarantees, investment recovery clauses, and change management mechanisms, all of which can limit immediate pass-through of AI-driven efficiencies to clients. Providers frequently argue these protections are necessary due to their upfront AI investments and ongoing operational risk. As a result, clients should not expect to automatically capture short-term savings from AI unless contracts are explicitly renegotiated or contain clear benefit-sharing triggers.

Size and maturity impact

Negotiation power in AI-driven outsourcing is strongly influenced by client size, maturity, and internal capabilities. Smaller and less mature organizations are often disadvantaged by limited internal AI expertise and lower contract values, reducing their leverage with leading providers. This "knowledge asymmetry" can make it difficult for clients to benchmark offerings or negotiate favorable AI terms, a trend widely documented by Everest Group, ISG, and Deloitte. While large enterprise clients with annual agreements of \$50 million or more are more likely to secure cost savings or custom AI solutions, developments such as joint procurement, industry benchmarking, and the use of independent advisors are beginning to level the playing field for mid-market firms.

Successful renegotiation strategies

Outsourcing buyers that realize the greatest value from AI-enabled contracts typically invest in developing internal expertise or leveraging independent advisors to support negotiations. Value-focused approaches - such as phasing AI implementations, establishing clear performance milestones, and aligning incentives through shared savings arrangements - are associated with the most successful contract renegotiations. For mid-market organizations, expanding contract scope, extending duration, or partnering on investment in AI capabilities may improve negotiation outcomes, as pure cost-reduction demands often meet resistance or limited reductions from providers.

Clause Type	Prevalence in contracts signed pre-2023	Prevalence in contracts signed post-2023
Baseline service level guarantees	88%	74%
Investment recovery / amortization	62%	58%
Change management / additional fees	79%	68%
AI benefit-sharing triggers	14%	29%

AI benefit-sharing triggers are more present in newer contract templates; legacy contracts favor provider protections. (ISG, Outsourcing Contract Review, 2024)

Inaccuracy, cybersecurity, and intellectual-property infringement are the most cited risks of generative AI adoption.

McKinsey Study – The state of AI (2023)

Chapter 5 Implementation challenges and risk mgmt.

Technical integration complexity

Deploying AI agents in enterprise environments presents significant technical challenges that organizations often underestimate. Integration with existing ERP, CRM, and specialized business systems requires sophisticated API development and data synchronization capabilities. Legacy system compatibility issues frequently extend implementation timelines and increase costs beyond initial estimates.

Data quality and governance represent critical success factors often overlooked in initial planning. AI agents require high-quality, well-structured data to function effectively. Organizations frequently discover data quality issues during implementation that require substantial remediation efforts. Establishing data governance frameworks, access controls, and audit trails adds complexity and cost to deployments.

Security and compliance requirements introduce additional technical challenges. AI agents processing sensitive business or customer data must comply with regulatory requirements such as GDPR, financial services regulations, and industry-specific standards. Implementing appropriate security controls, audit capabilities, and compliance reporting often requires specialized expertise and additional technology investments.

Risk mitigation strategies

Successful AI agent implementations incorporate comprehensive risk management strategies from the outset. These strategies address technical risks such as system failures and data quality issues, operational risks including process exceptions and escalation procedures, and strategic risks such as vendor dependency and technology obsolescence.

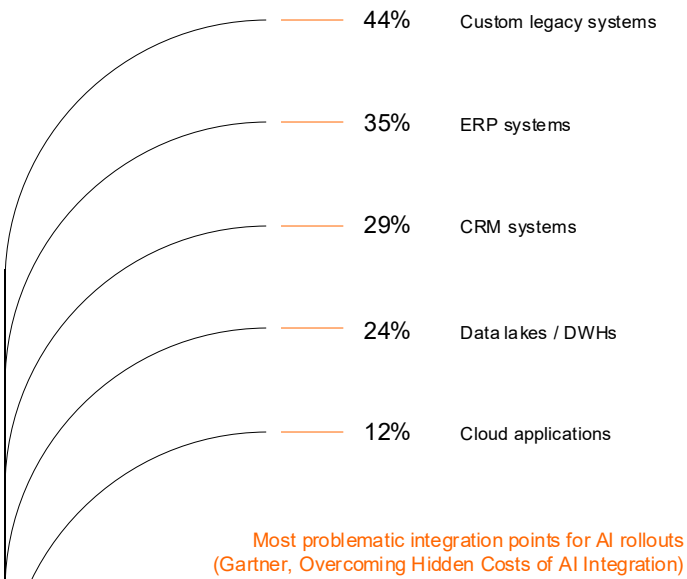
Technical risk mitigation includes robust testing procedures, fallback systems for AI agent failures, and continuous monitoring of AI performance and accuracy. Organizations implement automated alerts for performance degradation, manual override capabilities for critical processes, and regular model retraining to maintain accuracy over time.

Operational risk management focuses on clear escalation procedures, human oversight mechanisms, and exception handling processes. Successful implementations define clear boundaries for AI agent authority, establish human review requirements for high-risk decisions, and maintain staff capabilities to handle process exceptions and system failures.

Strategic risk mitigation addresses longer-term concerns about vendor dependency, technology evolution, and competitive positioning. Organizations negotiate contract terms that preserve flexibility, invest in internal AI capabilities to reduce vendor dependency, and maintain awareness of technology developments that might affect their AI agent strategies.

“62% of enterprises report a “meaningful delay” in AI deployment timelines due to integration complexity or data quality remediation.”

Gartner, AI Integration Obstacles Survey (2023)



Chapter 6 Governance and ethical considerations

Regulatory compliance framework

The deployment of AI agents in business processes introduces complex regulatory compliance requirements that vary by industry and jurisdiction. The European Union's AI Act, implemented in 2024, establishes specific requirements for AI systems used in high-risk applications, including financial services, healthcare, and employment decisions. Organizations must ensure their AI agent implementations comply with these evolving regulatory frameworks.

Financial services organizations face particularly stringent requirements for AI transparency and explainability. Regulatory bodies require clear documentation of AI decision-making processes, audit trails for automated decisions, and human oversight mechanisms for critical determinations. These requirements add complexity and cost to AI agent implementations in regulated industries.

Data protection regulations such as GDPR impose additional requirements on AI agents processing personal information. Organizations must implement privacy-by-design principles, obtain appropriate consent for AI processing, and provide individuals with rights regarding automated decision-making. Compliance with these requirements requires careful system design and ongoing monitoring capabilities.

Ethical AI implementation

Ethical considerations in AI agent deployment extend beyond regulatory compliance to encompass fairness, transparency, and social responsibility. Organizations must address potential bias in AI decision-making, ensure equitable treatment of different customer or employee groups, and maintain transparency about AI involvement in business processes.

Bias detection and mitigation require ongoing monitoring of AI agent decisions and outcomes. Organizations implement statistical analysis to identify potential discriminatory patterns, regular audits of AI decision-making, and corrective measures when bias is detected. These activities require specialized expertise and dedicated resources throughout the AI agent lifecycle.

Transparency requirements vary by application and stakeholder group. Customers may require disclosure of AI involvement in service delivery, employees need understanding of AI's role in workplace decisions, and regulators demand detailed documentation of AI capabilities and limitations. Meeting these diverse transparency requirements requires comprehensive communication strategies and documentation systems.

Governance structure design

Effective AI agent governance requires cross-functional collaboration between technology, business, legal, and risk management teams. Organizations establish AI governance committees with representation from all affected business areas, clear decision-making authority for AI-related issues, and regular review processes for AI agent performance and compliance.

Governance frameworks address AI agent lifecycle management, including development standards, testing requirements, deployment approvals, and ongoing monitoring procedures. These frameworks ensure consistent approaches across different AI agent implementations and provide clear accountability for AI-related decisions and outcomes.

Risk management integration ensures that AI agent risks are incorporated into enterprise risk management frameworks. Organizations assess AI-specific risks such as model drift, data quality degradation, and algorithmic bias alongside traditional operational and strategic risks. This integration enables comprehensive risk assessment and mitigation planning.

“44% of large organizations have an established cross-functional AI governance committee to oversee lifecycle management, compliance, and risk.”

Gartner, Emerging Tech: AI Governance and Assurance (2023)

Most common AI ethics controls and practices in large organizations (IBM, Global AI Adoption Index 2024)

Control / Practice	% of Orgs Reporting Adoption
Algorithmic bias detection/mitigation	57%
AI ethics training for developers	52%
Transparent documentation / disclosure	47%
Regular AI audits	38%
Dedicated AI ethics governance bodies	34%

Chapter 7

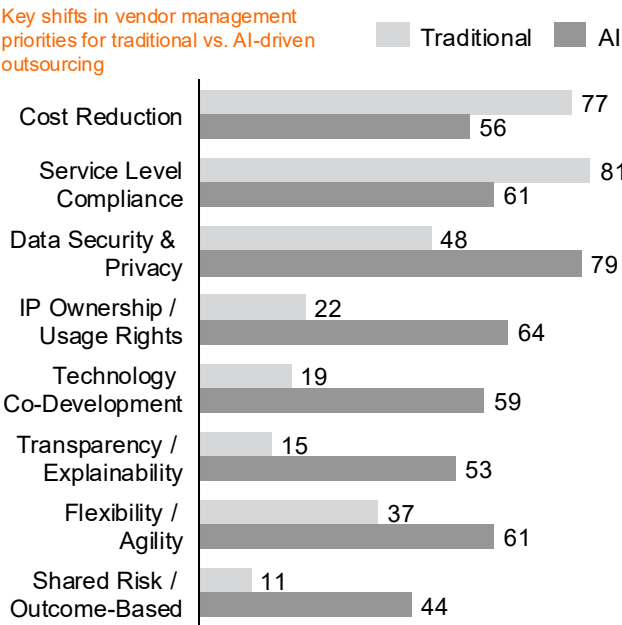
Strategic recommendations and future outlook

Vendor relationship management

The shift to AI agent-supported operations requires new approaches to vendor relationship management that account for the different dynamics of technology-enabled services. Traditional outsourcing relationships focused on service level agreements, cost management, and performance monitoring. AI agent relationships require additional considerations around technology development, data sharing, and intellectual property.

Successful vendor relationships for AI services emphasize collaboration and shared value creation rather than traditional buyer-supplier dynamics. Vendors invest significantly in AI platform development and customization, requiring longer-term commitments and shared risk arrangements. Organizations that approach these relationships as strategic partnerships typically achieve better outcomes than those focused solely on cost minimization.

Contract structures for AI services should address technology evolution, performance improvement expectations, and intellectual property rights. AI capabilities improve continuously through learning and development, requiring contract terms that accommodate performance changes and technology updates. Organizations should negotiate transparency rights, performance benchmarking capabilities, and flexibility to adapt to technology evolution.



“75% of enterprises expect the scope of outsourced work suitable for AI agent automation to at least double by 2026.”

Everest Group, Market Vista: Global Outsourcing Trends 2024

Future technology trends

The AI agent landscape continues evolving rapidly, with several trends likely to impact outsourcing strategies significantly. Multi-agent systems that coordinate multiple AI agents for complex workflows represent an emerging capability that could transform process automation. These systems enable more sophisticated task delegation and coordination than single-agent implementations.

Large language models and generative AI capabilities are expanding the range of cognitive tasks suitable for AI agent automation. These technologies enable AI agents to handle more complex communication, analysis, and creative tasks previously requiring human expertise. Organizations should monitor these developments for opportunities to expand AI agent applications.

Integration with Internet of Things (IoT) devices and edge computing capabilities will enable AI agents to interact with physical systems and real-time data streams. This integration expands AI agent applications into manufacturing, logistics, and field service operations. Organizations in these sectors should consider how these capabilities might transform their outsourcing strategies.

Phased implementation

Organizations should approach AI deployment not just as an internal IT project but as a strategic sourcing transformation that leverages external providers and market innovation to achieve sustainable cost and performance improvements. A phased approach can help firms build capabilities, manage investment risk, and outperform traditional outsourcing models over time.

Phase 1: Foundation Building (6-12 months)

Assess Process Portfolio

Identify processes with high automation potential using cost modeling benchmarks (administrative, call center, and finance processes are leading candidates for first-wave AI deployment).

Data Readiness & Governance

Invest in data management and governance - poor data quality is the #1 barrier to achieving AI ROI in outsourced models.

Provider/Market Scan

Conduct sourcing diagnostics—evaluate potential partners not only on technology, but on delivery capability, contract structure flexibility, and experience in AI-embedded outsourcing.

Pilot Implementations

Start pilots (low-risk, high-impact domains), ideally through "proof-of-value" contracts with outsourcers willing to share risk and success metrics.

Cost Planning

Map upfront and ongoing costs for internal AI investment versus provider AI-enabled offerings. According to ISG (2024), average first-year AI costs are 15–30% higher than traditional outsourcing, but cost reductions of 30–40% are achievable by year 3 if phased sourcing is used.

Phase 2: Selective Scaling (12-24 months)

Expand Pilots through Sourcing Partnerships

Negotiate larger-scale outsourcing contracts or renewals that embed AI benefit-sharing:

- Use Everest's "Shared Savings" models: Contract ties provider margin to measurable cost reductions.
- Leverage ISG's advice to synchronize contract renewal periods with successful pilot completion to maximize bargaining power.

Hybrid Human-AI Delivery

Implement hybrid models and combine provider platforms with retained internal expertise for critical processes.

Change Management & Renegotiation

Develop programs to transition staff and renegotiate provider relationships; include provisions for flexible cost structure and performance milestones.

Vendor Management

Establish service level agreements for AI performance and conduct regular benchmarking against market pricing and outcomes (48% of successful sourcing transitions included quarterly vendor performance reviews).

Phase 3: Strategic Integration (24+ months)

Enterprise-wide AI Sourcing Strategy

Integrate AI agents into core business and sourcing plans; continuously evaluate insourcing vs. outsourcing for new capabilities.

Co-Creation and Innovation

Initiate joint innovation initiatives ("co-creation labs") with providers, focusing on industry-specific AI applications (37% of large enterprises use co-creation approaches with key outsourcing partners to accelerate AI adoption).

Performance Optimization

Use real-time analytics and benchmarking to optimize costs (Organizations that embed AI co-creation with providers achieve up to 45% lower total process cost compared to traditional outsourcing models by year 3-5).

Contract Renewal/Negotiation Timing

Plan major renegotiations post-phase 2, once pilot results are proven; align contract cycles with scaling milestones to capture provider willingness to invest.



Navigating the AI Outsourcing Transformation

The integration of AI agents into outsourcing strategies represents a fundamental shift in how organizations delegate work, optimize processes, and structure vendor partnerships. The potential benefits of AI agent deployment are substantial - average cost reductions of 35–50% over three-year periods compared to traditional outsourcing models. However, these benefits do not occur automatically; they require sophisticated planning, substantial upfront investment, and ongoing risk management. Most organizations experience higher costs in the first year, with savings realized primarily in subsequent years as technology investments mature and workflows stabilize.

Our analysis yields several insights for organizations evaluating AI outsourcing:

- Comprehensive organizational readiness is essential. Success requires far more than technology deployment; organizations must invest in data governance, staff retraining, and change & vendor relationship management.
- Economics differ significantly from traditional models. AI shifts cost structures toward technology and operational usage, not pure labor arbitrage. Only with effective planning and phased scaling do savings consistently outpace traditional outsourcing.
- Contracting dynamics remain challenging. According to ISG, 78% of outsourcing contracts signed prior to 2023 protect providers against immediate cost reduction demands. Successful renegotiation calls for strong internal expertise, use of external advisors, and collaborative negotiation strategies like shared savings or co-creation agreements, which have helped some large enterprises achieve up to 45% cost reduction after three to five years.
- Hybrid models are emerging as industry standard. Analysts forecast that the future of outsourcing is not “AI-only” but calls for orchestrated hybrid workflows, combining AI agents for standardized and cognitive tasks with human expertise for complex problem solving and relationship-driven activities.

The transformation is well underway among industry leaders. Companies that delay engagement risk competitive disadvantage, while those that rush without robust planning face high likelihood of failed deployments and wasted investment. Strategic imperatives for success are clear:

- Develop AI agent capabilities systematically, through phased implementation and continuous capability building.
- Build on solid foundations of data governance, organizational readiness, and vendor relationship management.
- Prioritize collaborative sourcing and contract strategies—including benchmarking, milestone-based renegotiation, and co-creation models—to maximize realized value and minimize risk.

Organizations that master the transition to AI-powered, hybrid outsourcing will reshape their industries and set new standards for operational excellence, efficiency, and agility in the digital age.



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About Eraneos

As an international strategy, transformation and technology consulting group Eraneos is dedicated to empowering organizations to thrive in an ever-changing digital age. By bringing together top-tier experts from business and tech, we make sure that our clients can continuously raise the bar in successful transformations. We operate as a European-centered boutique at scale, delivering a seamless consulting experience where the whole is greater than the sum of its parts. From strategy to execution, our solutions are hands-on and actionable, not just polished presentations. Our diverse teams combine in-depth industry knowledge with a wealth of experience to support leading organizations across sectors. We work pragmatically, side by side with our clients, to deliver lasting results.

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