



Robotic Process Automation (RPA) Annual Report 2019 – Laying the Foundation for a Light-touch Organization

Service Optimization Technologies (SOT)

Annual Report – September 2019: Complimentary Abstract / Table of Contents

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Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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Background and scope of the research

Background of the research

Robotic Process Automation (RPA) is a key enabler of enterprise automation. It is rapidly gaining traction across industries and geographies, and continues to expand its reach and client base as more enterprises are becoming aware of its benefits. These benefits include reduction in costs, increased operational efficiency & quality, increased workforce productivity, enhanced customer & employee experience, and quick time-to-value. Encouraged by a growing number of success stories and positive word of mouth, many enterprises, Global In-house Centers (GICs), and service providers are investing in RPA. Selecting the right enterprise-grade RPA technology partner(s) is critical to success. However, RPA is a burgeoning market with technologies that are relatively new to many potential buyers in terms of product features, deployment options, training & support, partner ecosystem, and commercial models. The technologies are also evolving, with an expanding feature set and increasing richness of functionality.



In this study, we investigate the state of the RPA software vendor market. We focus on:



Market size and growth



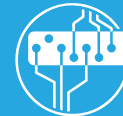
Buyer adoption by geography, size, industry, and business function/process



Enterprise RPA journey – key challenges and best practices



Solution characteristics and technology trends



RPA vendor landscape



Future outlook for 2019-2021

Scope of this report

RPA products that are sold on license, and irrespective of any ongoing business or IT process outsourcing or managed services, were considered for this report. RPA products from 22 leading software vendors across the globe have been assessed for this study

Robotic Process Automation (RPA) is one of the key enablers of digital transformation for enterprises and global service providers. This report examines global RPA technology vendor market and analyzes it across various dimensions such as market overview, buyer feedback, RPA adoption characteristics, RPA solution characteristics, technology trends, technology vendor landscape, and future outlook.

Some of the findings in this report, among others, are:

Market size and adoption trends

- The global RPA independent software vendor market surpassed US\$1 billion in 2018, of which about 32% was from professional services such as consulting, training, and implementation
- The RPA software licenses market stood at over US\$700 million and is expected to grow between 70-85% annually up to 2020, driven by increasing awareness, rising sophistication, expansion in new markets, and positive momentum created by early success stories
- RDA / attended RPA market segment witnessed increased traction in 2018

Buyer expectations and enterprise RPA journey

- Operational impact is the most important factor driving RPA adoption, followed by cost impact; buyers are satisfied with RPA vendors in these dimensions
- The majority of RPA buyers are still in an early adoption phase, as they continue to face challenges while scaling up adoption
- Lack of robust RPA strategy, organizational change management, lack of experienced RPA resources, IT security and compliance concerns, and filling up automation pipeline are among the major inhibitors for RPA adoption for enterprises

Solution characteristics and technology trends

- RPA vendors, especially the leading ones, continue to build a robust partner ecosystem for global distribution, offer implementation & support services, as well as improve access to collaborative technologies
- RPA vendors are offering client trainings through online courses and classroom sessions along with community version of the platform to increase product familiarity. Vendors are expanding their RPA solution teams to keep pace with the market growth and better support enterprises in their journey
- As the market demands a scalable and flexible workforce along with end-to-end task automations, technologies such as online digital worker marketplace, predictive SLA monitoring, and workload balancing would witness increasing adoption

RPA vendor landscape

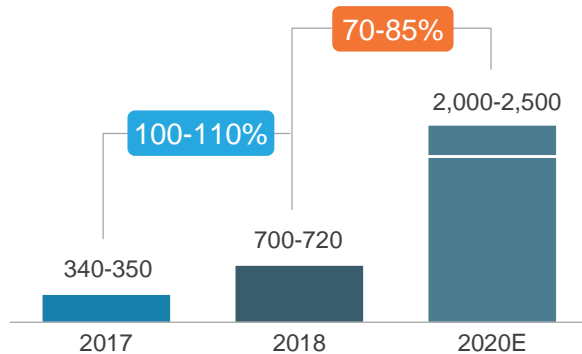
- Automation Anywhere, Blue Prism, and UiPath are the top vendors in terms of RPA license revenue, closely followed by NICE. Pegasystems leads in terms of revenue from RDA / attended RPA licenses
- UiPath is among the top five players in the maximum number of industries, followed by Automation Anywhere and Blue Prism
- RPA vendors have made investments in multiple areas such as building their technology capability, partner ecosystem, and having strong training modules for their clients

This study offers seven distinct chapters providing a deep dive into key aspects of RPA market; below are four charts to illustrate the depth of the report

RPA software market size and adoption trends

RPA software market size
US\$ million

XX CAGR (2018-20)



Enterprise RPA journey – challenges and best practices

Type of challenge

Challenge

Vision and strategy

Lack of robust RPA strategy and roadmap

Organization and talent

Organizational change management

IT security & compliance concerns

Resourcing

Lack of experienced RPA resources

Technology

Tool selection

Problems with RPA technology

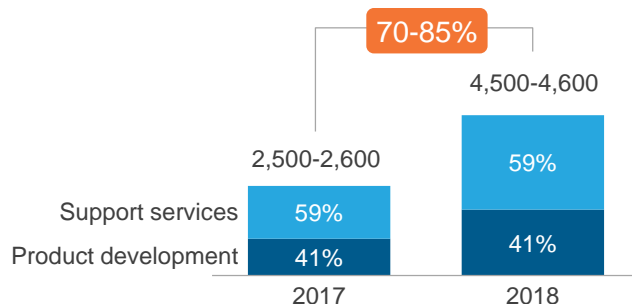
Implementation

Automation pipeline

RPA Solution characteristics

Distribution of RPA software vendor FTEs by type of work
Percentage of FTEs

XX CAGR (2018-20)



RPA vendor landscape

Vendors' RPA market share by license revenue

(Vendors are listed in alphabetical order within each category)



Research calendar – Service Optimization Technologies (SOT)

Published
 Planned
 Current release

Flagship SOT reports

Release date

Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix™ Assessment 2019	March 2019
Intelligent Document Processing (IDP) Annual Report 2019 – Let AI Do the Reading	May 2019
Robotic Process Automation (RPA) – Technology Vendor Landscape with Products PEAK Matrix™ Assessment 2019	June 2019
Robotic Process Automation (RPA) – Technology Vendor Profile Compendium 2019	July 2019
Robotic Process Automation (RPA) Annual Report 2019 – Laying the Foundation for a Light-touch Organization	September 2019
Intelligent Automation (IA) in Business Process Services (BPS) – Solution Provider Landscape with PEAK Matrix™ Assessment 2019	Q4 2019
Intelligent Automation (IA) in Business Process Services (BPS) – State of the market report 2019	Q4 2019
Enterprise RPA Automation Adoption – Pinnacle Model™ Analysis 2019	Q4 2019

Thematic SOT reports

Think Banks Have Gotten the Most Out of Automation? Think Again!	February 2019
Process Mining – The New Juggernaut Driving Digital Transformation	March 2019
Doctors with Robots – True 21st Century Healthcare Provision	March 2019
Intelligent automation: Accelerating from Short-term Wins to Long-term Strategic Business Outcomes	March 2019
Advanced Content Intelligence – Pivotal Technology to Empower the New Age Organization	May 2019
Who Takes on the RPA Mantle?	June 2019
Intelligent Document Processing (IDP) Playbook	Q3 2019
AI in Business – A Primer	Q4 2019

Note: For a list of all of our published SOT reports, please refer to our [website page](#)

Additional SOT research references

The following documents are recommended for additional insight into the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

- 1. Robotic Process Automation (RPA) – Technology Vendor Landscape with Products PEAK Matrix™ Assessment 2019** ([EGR-2019-38-R-3217](#)); 2019. Robotic Process Automation (RPA) is a key enabler of enterprise automation. This report uses Everest Group's proprietary PEAK Matrix™ to assess and evaluate RPA capabilities of independent software vendors across two key dimensions, market impact and vision & capability. It also includes competitive landscape & market share analysis, Everest Group's remarks on software vendors highlighting their key strengths & areas of improvement, assessment of vendors' RDA / attended RPA capabilities, and insights into advances in RPA technologies
- 2. Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix™ Assessment 2019** ([EGR-2019-38-R-3101](#)); 2019. This report uses Everest Group's proprietary PEAK Matrix™ to assess and evaluate IDP software products of 16 technology vendors across two key dimensions – market impact as well as vision and capability. It also includes IDP competitive landscape, Everest Group's remarks on IDP vendors highlighting their key strengths and areas of improvement, and IDP product capability trends and predictions
- 3. Smart RPA Playbook** ([EGR-2018-38-R-2824](#)). Smart RPA, which blends both RPA and AI capabilities, is a core competency that can successfully enable digital transformation for enterprises. Using a five-step approach to adopt, expand, and scale Smart RPA deployments, this Playbook taps various frameworks, such as Everest Group's Pinnacle Model™ and Capability Maturity Model (CMM), to empower enterprises to conceptualize where they want to go with enterprise automation, what capabilities they need to develop to get there, and the ideal path for their journeys

For more information on this and other research published by Everest Group, please contact us:

Sarah Burnett , Executive Vice President and Distinguished Analyst:	sarah.burnett@everestgrp.com
Amardeep Modi , Practice Director:	amardeep.modi@everestgrp.com
Harpreet Makan , Senior Analyst:	harpreet.makan@everestgrp.com
Akash Munjal , Analyst:	akash.munjal@everestgrp.com
SOT Team:	SOTResearch@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



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Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-80-61463500

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

Toronto

canada@everestgrp.com
+1-416-388-6765

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