

Robotic Process Automation (RPA) – Technology Vendor Landscape with Products PEAK Matrix[®] Assessment 2020

September 2020: Complimentary Abstract / Table of Contents



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Background of the research

Background of the research

Robotic Process Automation (RPA) has been one of the fastest growing markets in the enterprise automation segment in the past decade. There is wide adoption across industries and geographies, as more enterprises are becoming aware of its benefits. It has been a key enabler for organizations in reduction of costs, greater 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 Business Services (GBS), 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, rapidly evolving in terms of product features, deployment options, product architecture, training & support, partner ecosystem, and commercial models. The technologies along with the delivery models are evolving, with an expanding feature set and increasing richness of functionality.

In this study, we analyze the RPA technology landscape across various dimensions

- Everest Group's PEAK Matrix® evaluation, a comparative assessment of 21 leading RPA technology vendors
- Competitive landscape in the RPA technology vendor market
- Key RPA technology trends
- Remarks on key strengths and areas of improvement for each RPA technology vendor
- Assessment of RDA / attended RPA capabilities

Scope of this report:



Products
Robotic Process
Automation (RPA)



Geography
Global



Technology vendors
21 leading RPA
technology vendors

Everest Group’s SOT research is based on multiple sources of proprietary information

Proprietary database of 21 RPA technology vendors

- The database tracks the vendors’ offering/capabilities for:
 - Automation design, development, and integration
 - Automation control, monitoring, and analytics
 - Deployment and hosting options
 - Partnerships with service providers and other technology vendors
 - Product-related training and support services
 - Availability and adoption of commercial model(s)
 - IT governance and security

Proprietary operational information database of technology vendors (updated annually)

- The database tracks the following operational information for each vendor:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by different lines of business
 - Portfolio coverage in terms of industry, geography, process areas, and buyer size

Demonstrations and interactions with technology vendors and other industry stakeholders

- Detailed demos for a comprehensive product view and executive-level discussions with RPA vendors that cover:
 - Current state of the market
 - Vision and strategy
 - Annual performance and outlook
 - Opportunities and challenges
 - Emerging areas of investment

Buyer reference interviews, ongoing buyer surveys, and interactions

- Interviews with technology vendors’ reference clients and enterprise RPA buyers to get the buyer perspective around
 - Drivers and objectives for adopting RPA
 - Apprehensions and challenges
 - Assessment of vendors’ performance
 - Emerging priorities / buying criteria
 - Outcomes achieved
 - Lessons learnt and best practices

¹ In this study, we have assessed vendors’ offerings / product capabilities as of April 2020. Analysis for Softomotive is based on capabilities before its acquisition by Microsoft
The source of all content is Everest Group unless otherwise specified

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any contract-specific information collected will only be presented back to the industry in an aggregated fashion

Vendors assessed¹



Overview and abbreviated summary of key messages

Robotic Process Automation (RPA) is a key enabler of enterprise automation. This report leverages 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 technology vendors highlighting their key strengths & areas of improvement, assessment of vendors' RDA / attended RPA capabilities, and insights into advances in RPA technologies.

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

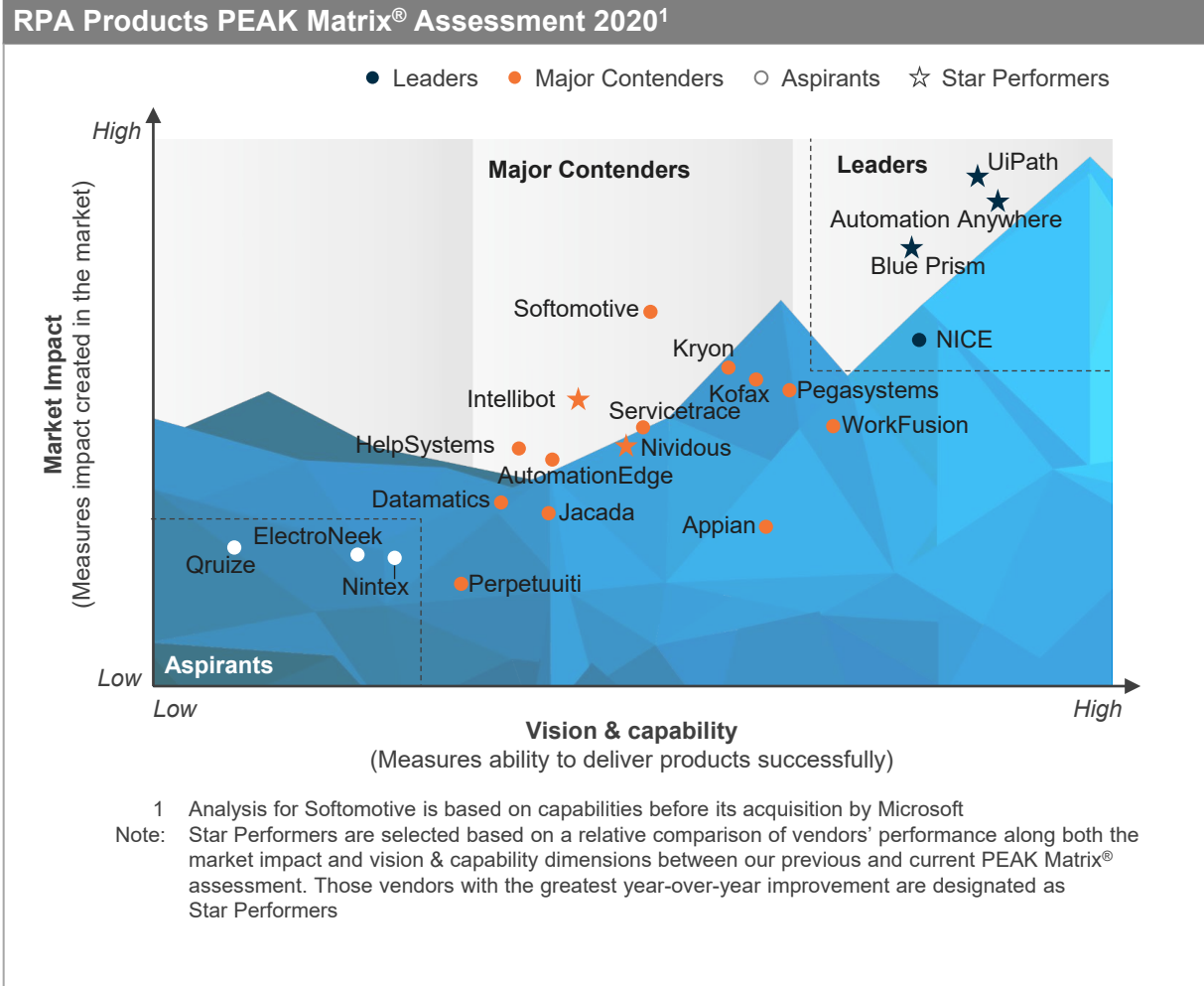
Everest Group RPA Products PEAK Matrix® 2020

- Everest Group classifies 21 RPA technology vendors on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants:
 - **Leaders:** Automation Anywhere, Blue Prism, NICE, and UiPath
 - **Major Contenders:** Appian, AutomationEdge, Datamatics, HelpSystems, Intellibot, Jacada, Kofax, Kryon, Nividous, Pegasystems, Perpetuuiti, Servicetrace, Softomotive, and WorkFusion
 - **Aspirants:** ElectroNeek, Nintex, and Quize
- Everest Group also identified five technology vendors as the “2020 RPA Market Star Performers” – Automation Anywhere, Blue Prism, Intellibot, Nividous, and UiPath. This was based on the relative year-over-year movement of different technology vendors on the PEAK Matrix®

Insights on competitive landscape

- Automation Anywhere, Blue Prism, and UiPath are the top vendors in terms of RPA software revenue; Automation Anywhere, Blue Prism, HelpSystems, Kofax, Softomotive, and UiPath are the top vendors by number of clients
- Automation Anywhere, Blue Prism, and NICE lead in banking & capital markets, CPG & retail, and telecom verticals, respectively. UiPath has the highest market share in insurance, healthcare & pharma, and manufacturing industries
- Blue Prism holds the highest market share by revenue in banking and insurance industry-specific process areas, while UiPath leads across horizontal functions such as F&A, procurement, and HR. Pega has the highest market share in the contact center space
- UiPath has emerged as the Leader across North America, Continental Europe, APAC, and MEA regions. Automation Anywhere and Blue Prism continue to hold top positions in LATAM and the UK, respectively
- Changing supplier landscape with the entry of big technology and larger automation vendors in the RPA market is driving the availability of unlimited usage-based pricing models to put downward pricing pressure

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



Capability assessment Illustrative example

Measure of capability: ● High ○ Low

Technology Vendor	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Development & integration	Deployment & maintenance	Product training & support	Commercial & sales model	Overall
Technology vendor 1	●	○	●	●	●	○	●	●	○	○
Technology vendor 2	○	○	○	○	○	○	●	○	○	○
Technology vendor 3	○	●	●	●	●	○	○	○	○	○
Technology vendor 4	○	○	○	○	●	○	●	○	○	○
Technology vendor 5	○	●	○	●	○	○	○	○	○	○
Technology vendor 6	○	○	○	○	○	○	○	○	○	○
Technology vendor 7	○	○	○	○	○	○	●	○	○	○
Technology vendor 8	○	○	○	○	○	○	○	○	○	○
Technology vendor 9	○	○	○	○	○	○	○	○	○	○

Everest Group's remarks on technology vendors Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Development & integration	Deployment & maintenance	Product training & support	Commercial & sales model	Overall
○	○	○	○	○	○	○	○	○	○

Strengths

- XXX envisions to provide an intelligent automation platform that brings together various components of digital transformation. It has a rich experience of serving enterprise clients globally across key verticals, and has deployed its platform for prevalent use cases
- Clients have appreciated XXX product vision, continuous innovation, quick roadmap progression

Areas of improvement

- The XXX platform presently lacks a built-in process recorder capability that can help ease the learning process for new users to automate low complex tasks and processes
- Most of XXX clientele belongs to the BFSI industry and it has limited experience of serving enterprises in other verticals

Research calendar

Service Optimization Technologies

■ Published
 ■ Planned
 ■ Current release

Flagship SOT reports

	Release date
Enterprise Intelligent Automation Adoption – Pinnacle Model® Assessment 2019	December 2019
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	February 2020
Intelligent Automation in Business Processes (IABP) Solution Provider Landscape with PEAK Matrix® Assessment 2020	March 2020
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	March 2020
Intelligent Virtual Agents (IVA) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	March 2020
Intelligent Virtual Agents (IVA) State of the Market Report 2020 – Conversing with AI	June 2020
Robotic Process Automation (RPA) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	September 2020
Robotic Process Automation (RPA) State of the Market Report 2020	Q4 2020

Thematic SOT reports

	Release date
Who Takes on the RPA Mantle?	June 2019
Intelligent Document Processing (IDP) Playbook	September 2019
Accelerated Intelligent Automation (AIA) in Enterprises	May 2020
The 360-degree Enterprise Automation Playbook	May 2020
Practitioner Perspectives – Mastering Efficiency and Innovation with Intelligent Automation	May 2020
Buyer Satisfaction with Intelligent Document Processing (IDP) – Are Buyers Delighted or Disenchanted?	July 2020
AI Trailblazers 2020 - AI Startups Redefining the Business Process Services	Q4 2020

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