Robotic Process Automation (RPA) – Technology Provider Compendium 2022

November 2021: Complimentary Abstract / Table of Contents

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Service Optimization Technologies

- ▶ Application Services
- ▶ Banking & Financial Services BPS
- ▶ Banking & Financial Services ITS
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- ▶ Supply Chain Management (SCM) Services
- ▶ Talent Excellence GBS
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- ▶ Technology Skills & Talent
- ▶ Trust and Safety
- ▶ Work at Home Agent (WAHA) Customer Experience Management (CXM)
- ▶ Workplace Services

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Tracking: service providers, locations, risk, technologies

Locations: costs, skills, sustainability, portfolios

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Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

01
Robust definitions and frameworks

Function-specific pyramids, Total Value Equation (TVE), PEAK Matrix®, market maturity

02
Primary sources of information

Annual RFIs, technology provider briefings and buyer interviews, web-based surveys

03
Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership

04
Fact-based research

Data-driven analysis with expert perspectives, trend-analysis across market adoption, contracting, and technology providers

Proprietary database on Robotic Process Automation (RPA) capabilities of 23 technology providers

Repository of existing research in RPA

Dedicated team for RPA research

Executive-level relationships with buyers, service providers, technology providers, and industry associations

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Background of the research

With the COVID-19 pandemic accelerating the need for digital transformation among enterprises across industries and geographies, Robotic Process Automation (RPA) has emerged as a key enabler in the enterprise automation segment. While the overall automation ecosystem is rapidly evolving through new technologies, such as Intelligent Document Processing (IDP) and conversational Artificial Intelligence (AI), RPA continues to remain a foundational element of this ecosystem. The RPA market has been one of the fastest-growing software markets in the past decade and has played a key role in helping organizations reduce costs, achieve greater operational efficiencies and quality, increase workforce productivity, enhance customer and employee experience, and realize quick time-to-value. Encouraged by a growing number of success stories and positive word-of-mouth, many enterprises, Global Business Services (GBS) organizations, and service providers are investing in RPA. However, to achieve success, it is vital to select the right enterprise-grade RPA solution.

This report provides key stakeholders a snapshot of the RPA offerings and capabilities of 23 leading RPA technology providers. The report will help existing and potential buyers of RPA software to assess the technology providers on the capabilities they desire. It will also allow technology providers to compare their offerings, capabilities, and strengths and limitations with other providers in the marketplace.

Each technology provider profile covers the following details of providers vis-à-vis their RPA offerings and capabilities:

- Company overview
- Recent deals and announcements
- Market adoption and client portfolio mix
- Product features & functionalities

- Key product enhancements
- Delivery capabilities & partnerships
- Measure of capabilities across PEAK Matrix® dimensions
- Key strengths and limitations for technology providers

Scope of this report:

Geography
Global

Technology providers
23 leading RPA technology providers

Products
Robotic Process Automation (RPA)

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

Proprietary database of 23 RPA technology providers
- The database tracks the providers' offering/capabilities for:
  - Automation design, development, and integration
  - Automation control, monitoring, and analytics
  - Deployment and hosting options
  - Partnerships with service providers and other technology providers
  - Product-related training and support services
  - Availability and adoption of commercial model(s)
  - IT governance and security

Proprietary operational information database of technology providers (updated annually)
- The database tracks the following operational information for each provider:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by different Lines of Business (LoBs)
  - Portfolio coverage in terms of industry, geography, process areas, and buyer size

Demonstrations and interactions with technology providers and other industry stakeholders
- Detailed demos for a comprehensive product view and executive-level discussions with RPA providers 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 providers' reference clients and enterprise RPA buyers to get the buyer perspective around:
  - Drivers and objectives for adopting RPA
  - Apprehensions and challenges
  - Assessment of providers' performance
  - Emerging priorities / buying criteria
  - Outcomes achieved
  - Lessons learnt and best practices

Technology providers assessed[1]

aiwozo AI WORK ZONE · appian · AUTOMATION ANYWHERE Go be great.

AutomationEdge · blueprism · DATAMATICS

lectroNeek · helpsystems · IBM

Jacada AUTONOMOUS CX · JIFFY.ai · KRYON

LAIYE · Microsoft · NICE

nintex · nividous · PERPETUUITI Automation Simplified

qruize · SAP · servicetrace

UiPath · WorkFusion

1 In this study, we have assessed providers' offerings / product capabilities as of April 2021. Analyses for Jacada and Servicetrace are based on their capabilities before they were acquired by Uniphore and Salesforce, respectively
   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

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Version and release dates of the products evaluated (page 1 of 2)

Provider name	Product version assessed	Version release date
aiwozo AI WORK ZONE	21.0.4	April 30, 2021
appian	21.1	March 4, 2021
AUTOMATION ANYWHERE Go be great.	A360.20	April 20, 2021
AutomationEdge	6.1.0	March 24, 2021
blueprism	Blue Prism v6.10.1	February 2021
DATAMATICS	4.7	April 2021

Provider name	Product version assessed	Version release date
lectroNeek	ElectroNeek 5.0 Infinity	April 19, 2021
helpsystems	11.5	March 2021
IBM	20.12.5	March 26, 2021
Jacada AUTONOMOUS CX	Jacada Interact 12.9	January 2021
JIFFY.ai	4.2	April 2021
KRYON	21.4	April 2021

Version and release dates of the products evaluated (page 2 of 2)

Provider name	Product version assessed	Version release date
LAIYE	5.5.0	April 13, 2021
Microsoft	2.7.00158.21098	April 14, 2021
NICE®	7.4	December 2020
nintex	RPA Central 2.1.0 RPA Bot 17.1.0	May 5, 2021
nividous	6.X	February 2021
PERPETUUITI™ Automation Simplified	v2.5 & sub-version 21.5	November 2020

Provider name	Product version assessed	Version release date
qruize	Qruize Magic Platform v11 Qruize Magic BOT Agent v16	February 2021
SAP	2.0 2104	April 25, 2021
servicetrace	X1 2021.1	February 20, 2021
UiPath™	2021.4	April 26, 2021
WorkFusion	10.2.1	April 30, 2021

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The study provides detailed view of providers' RPA offerings & capabilities as well as key strengths & limitations | Snapshots to illustrate the depth of report

Capability assessment

Illustrative example

Measure of capability: ◐ Low ● High

Service provider	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 provider 1	◔	◑	●	◑	◑	◑	◑	◑	◑	◑
Technology provider 2	◑	●	●	●	●	●	●	◑	◑	●
Technology provider 3	◑	●	●	●	●	●	●	●	●	●
Technology provider 4	◑	●	●	●	●	●	●	●	●	◑
Technology provider 5	◑	◑	●	●	●	●	●	●	◑	◑
Technology provider 6	◑	◑	●	◑	◑	●	●	◑	●	◑
Technology provider 7	◑	●	●	●	◑	●	●	●	●	◑
Technology provider 8	◑	◑	●	◑	◑	●	◑	◑	◑	◑

Technology provider's overview

Company overview

xxx is a US-based RPA software provider that offers an enterprise-grade intelligent RPA and digital workforce platform. It provides a fully-integrated cloud native platform to automate business processes by combining RPA, AI, process intelligence, low-code, and embedded technologies (leveraging ML and NLP capabilities), enabling enterprises to build an AI-based digital workforce.

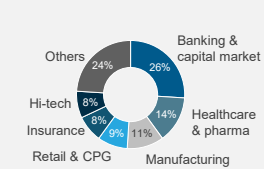**Key leaders**
- xxx

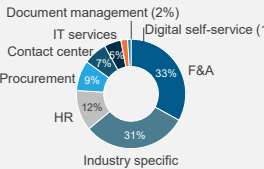**Headquarters:** xxx
Website: xxx

Key clients include xxxx

Recent deals and announcements (not exhaustive)
- **May 2021:** xxx
- **March 2021:** xxx
- **March 2021:** xxx
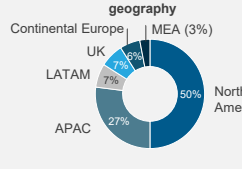- **June 2020:** xxx
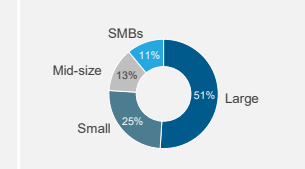- **October 2020:** xxx

Split of RPA revenue by buyer industry
- Banking & capital market 26%
- Healthcare & pharma 14%
- Manufacturing 11%
- Retail & CPG 9%
- Insurance 8%
- Hi-tech 8%
- Others 24%

Split of RPA revenue by process area
- Document management (2%)
- Digital self-service (1%)
- IT services 6%
- Contact center 7%
- Procurement 9%
- HR 12%
- Industry specific 31%
- F&A 33%

Split of RPA revenue by buyer geography
- Continental Europe
- UK 6%
- MEA (3%)
- North America 50%
- LATAM 7%
- APAC 27%

Split of RPA revenue by buyer size[1]
- SMBs 11%
- Mid-size 13%
- Large 51%
- Small 25%

Product features and functionalities

◐ ◑ ▢ lable via partner Available In the roadmap Not available

Design and development of robots	Built-in drag-&-drop design studio to create visual workflow view	Web-based design studio	Built-in macro recorder – DOM-based	Built-in macro recorder – COM-based
	Built-in macro recorder – computer vision-based	Built-in macro recorder – multi-anchor-based	Universal process recorder	Native ability to develop robots using voice commands
	Object capture – DOM recognition	Object capture – COM recognition	Object capture – computer vision	ICA protocol / native support for Citrix
	Grey scale image processing			

Reusability and interoperability	Ability to create a repository in the platform to share reusable automation assets	Ability of users to control access to shared assets in multi-team environments	Availability of a search box in the development studio / action library	Online marketplace/portal for pre-built, reusable assets/automations
	Built-in interface to connect to the online marketplace from the design studio	Pre-built connectors to automate SAP applications	Pre-built connectors to automate Oracle applications	Pre-built connectors to automate Microsoft applications
	Out-of-the-box plug-ins to trigger automations directly from business applications	Support for headless browsers and the ability to execute automations or deploy robots directly on servers		Availability of RPA product/software in the form of platform-as-a-service with SDK for extensibility.

Complementary capabilities	Conversational AI	Intelligent Document Processing (IDP)	Classic process mining	Desktop Process Mining (DPM) / task mining
	Business Process Management (BPM) / process orchestration			

Everest Group's remarks on technology providers

Illustrative example

Measure of capability: ◐ Low ● High

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 through its platform, envisions to provide an integrated, easy-to-use intelligent automation platform with embedded capabilities for RPA, IDP, analytics, and desktop process mining / task mining to help enterprises transform business processes
- It maintains a strong presence across all major geographies and key verticals. It continues to make investments in strengthening its thought leadership in the automation space through global events, community discussions, whitepapers, blogs, webinars/conferences, and industry briefings

Areas of improvement
- While the platform's control room supports Windows and Linux OS, the agent / bot runner is currently compatible only with Windows. Adding support for Linux and Mac OS could enhance its utility for enterprises looking to deploy automations in these operating systems
- It currently does not provide advanced predictive monitoring features such as the ability to leverage AI/ML to predict if SLAs are not going to be met based on available licenses and to notify users in advance in case of any expected SLA breach. Clients have also indicated the need for more enhanced and embedded AI-/ML-based analytics capabilities

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Research calendar
Service Optimization Technologies (SOT)

Published | **Planned** | **Current release**

Flagship reports	Release date
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	May 2021
Intelligent Document Processing (IDP) State of the Market Report 2021 – Key to Unlocking Value in Documents	June 2021
Intelligent Process Automation (IPA) – State of the Market Report 2021	June 2021
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	August 2021
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2021	September 2021
Conversational AI – State of the Market Report 2021	November 2021
Robotic Process Automation (RPA) – Technology Provider Compendium 2022	**November 2021**
Robotic Process Automation (RPA) State of the Market Report 2022	Q4 2021

Thematic reports	Release date
The 360-degree Enterprise Automation Playbook	May 2020
AI Start-ups Redefining Business Processes: Top 30 Trailblazers	December 2020
Understanding Cloud-native RPA	January 2021
Mine Your Journey to Digital Excellence	March 2021
Intelligent Document Processing (IDP) Playbook 2021	June 2021
Process Mining Playbook 2021	June 2021
Scaling Up Intelligent Automation – What Can We Learn from the Best?	August 2021

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