

Robotic Process Automation (RPA) – Technology Provider Compendium 2023

December 2022: Complimentary Abstract / Table of Contents



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Market intelligence

Tracking: 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

Background of the research

Evolving into a digital-first business is becoming increasingly important for organizations to remain resilient and competitive, especially after the COVID-19 pandemic. Manual operations pose numerous challenges and hence, organizations are trying to shift to digital, automated, and intelligent business processes. 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), process mining, task mining, API-based automation, and conversational AI, these technologies further strengthen RPA, which continues to be a foundational element of enterprise automation. RPA 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. Many enterprises, Global Business Services (GBS) organizations, and service providers are investing in RPA, and it has been one of the fastest growing software markets in the past decade.

RPA is rapidly evolving in terms of product features, deployment options, product architecture, training and support, partner ecosystem, and commercial models. The technologies and the delivery models are evolving quickly, with an expanding set of features and functionalities. Therefore, it is imperative for the organizations to select the right enterprise-grade RPA solution to realize the expected benefits.

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

- Everest Group's PEAK Matrix® evaluation, a comparative assessment of 23 leading RPA technology providers
- Competitive landscape in the RPA technology provider market
- Key RPA technology trends
- Remarks on key strengths and limitations for each RPA technology provider

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 learned and best practices







Technology providers assessed¹









¹ In this study, we have assessed providers’ offerings / product capabilities as of April 2022. Assessment for SAP excludes provider inputs. The analysis for SAP is based on Everest Group’s proprietary database, provider public disclosures, and Everest Group’s interactions with RPA buyers
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






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

Provider name	Product version assessed	Version release date
	22.1.2	April 30, 2022
	Appian 22.2, Appian RPA 8.1	May 27, 2022
	A360.24	April 8, 2022
	N/A	N/A
	RPA Studio and Robot v4.3	March 2022
	4.8	December 2021

Provider name	Product version assessed	Version release date
	Spring'22 release	April 2022
	iRobo 1.1.5	April 2022
	21.0.2	December 2021
	4.6.6	March 29, 2022
	Laiye IA 6.0	April 2022
	2204.1	April 26, 2022

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

Provider name	Product version assessed	Version release date
 NICE®	7.6	December 22, 2021
 nintex	N/A	N/A
 nividous	6.1	April 2022
 openbots	1.8.0	April 29, 2022
 PEGA	8.7.1	March 25, 2022
 qBotica	13	March 2022

Provider name	Product version assessed	Version release date
 SAIO	4.1.4	February 17, 2022
 SAP	N/A	N/A
 ss&c blueprism	Blue Prism Enterprise v7.0.1, Blue Prism Cloud 2021	November 2021
 UiPath™	2022.4	May 9, 2022
 WorkFusion	10.2.4.1	Apr 25, 2022

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

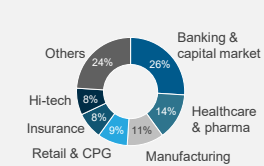
Website: xxx

Key clients include xxx

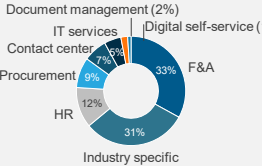
Recent deals and announcements (not exhaustive)

- May 2021: xxx
- March 2021: xxx
- March 2021: xxx
- June 2020: xxx
- October 2020: xxx

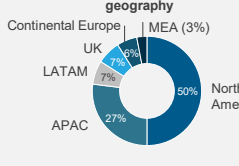
Split of RPA revenue by buyer industry



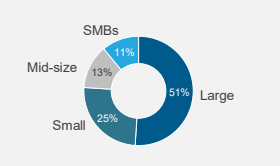
Split of RPA revenue by process area



Split of RPA revenue by buyer geography



Split of RPA revenue by buyer size¹



Product features and functionalities

Capability & offerings		Available	In the roadmap	Available via partner	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-/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/COM recognition	
	Object capture – computer vision	ICA protocol / native support for Citrix	Grey scale image processing	CoE portal to crowdsource, manage, and prioritize the automation pipeline	
	Workflow generation by importing process / task mining process maps	AI-/ML-based built-in guidance feature to aid developers			
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	
	Pre-built connectors to automate Google applications	Out-of-the-box plug-ins to trigger automations directly from business applications	Support for headless browsers and executing automations / robots directly on servers	Availability of RPA in the form of platform-as-a-service with SDK for extensibility	
Complementary capabilities	Conversational AI	Intelligent Document Processing (IDP)	Process mining	Task mining	
	API integration platform	Business Process Management (BPM) / process orchestration			
AI capabilities	Allowing users to create custom AI/ML prediction models	OOTB integrations with third-party AI/cognitive services	In-house pre-trained AI/ML models or cognitive services that can be used OOTB		

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

Research calendar

Service Optimization Technologies (SOT)

Published Planned Current release

Reports title	Release date
Defining Attended RPA – What to Look for in an Enterprise-grade Attended RPA Solution?	March 2021
Intelligent Process Automation (IPA) – Solution Provider Landscape with PEAK Matrix® Assessment 2022	March 2021
Intelligent Document Processing (IDP) – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	May 2021
Process Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	June 2021
The Business Case for Process Mining – From Evaluation to Value Realization	June 2021
A New Era of Business Process Innovation – Intelligent Processes Automation (IPA) State of the Market Report 2022	June 2021
Intelligent Document Processing (IDP) – State of the Market Report 2022	July 2022
Task Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	August 2022
Wear an Analytical Lens to Optimize Processes – Process Mining State of the Market Report 2022	September 2022
Task Mining – State of the Market Report 2023	October 2022
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2023	October 2022
Process Orchestration – Technology Provider Landscape with PEAK Matrix® Assessment 2023	November 2022
Robotic Process Automation (RPA) – Technology Provider Compendium 2023	December 2022
Process Orchestration – Technology Provider Compendium 2023	Q4 2022
Robotic Process Automation (RPA) – State of the Market Report 2023	Q4 2022

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