

VENDOR SELECTION MATRIX™ ROBOTIC PROCESS AUTOMATION SOFTWARE

ABRIDGED VERSION WITHOUT
VENDOR SCORES AND
SCORECARDS

THE TOP GLOBAL VENDORS 2020

Research In Action

May 2020

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RESEARCH IN ACTION
independent research & consulting

FOREWORD

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation where 60% of the evaluation is based on a survey of enterprise IT or business decision makers. This is balanced by analyst subject matter experts with input fed by a combination of intensive interviews with software or services vendors and their clients, plus the informed, independent points-of-view - all of which combine to make Research in Action Vendor Selection Matrix™ reports so unique. For this report we interviewed 1,500 IT managers with budget responsibility in enterprises globally. We selected those vendors which achieved the best evaluations scores from the buyers but disregarded the ones with fewer than 15 evaluations.

Manual processes are found in every business of today. Robotic Process Automation, a market which has experienced tremendous growth but also has stirred some debates about the replacement of the human workforce, consists of a large set of vendors offering attended, unattended and hybrid bots that mimic human actions to complete repetitive tasks and processes. Acquisitions have shaped this market in 2019 and will continue to do so in 2020. Security requirements, improved licensing models, the central control of robots and the challenges of process knowledge has shaped the solution offerings across the vendors.

The creation of smarter digital workers is critical for many enterprises as it allows the existing workforce to shift towards more creative and value add work across many industries. Adoption of process discovery and attended-mode Robotic Process Automation tools will allow for faster and higher quality process turnaround. Skeptics towards the agility and scalability and hesitations towards high implementation costs have been addressed by some of the vendors.

This report will guide you to important Robotic Process Automation trends and will aid you during your initial stage of deciding which vendors could best fit your requirements. There are pros and cons of every vendor and the priority use cases of your automation journey should guide your decision.

Regards,

Eveline Oehrlich



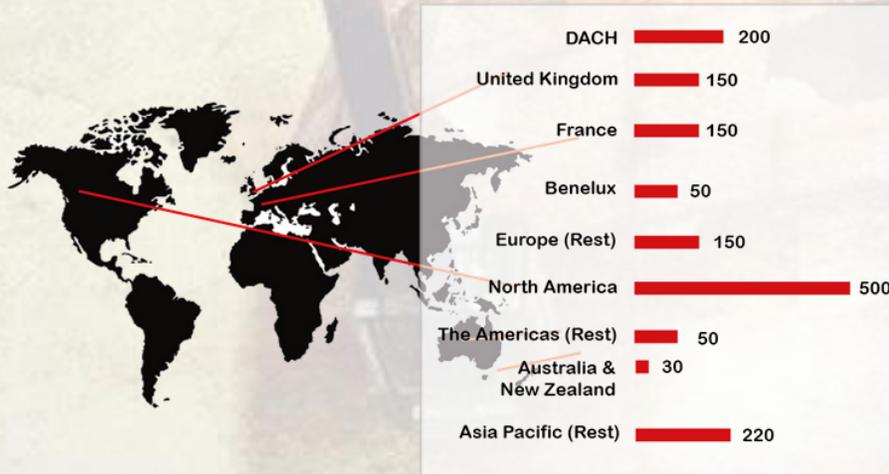
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THE VENDOR SELECTION MATRIX™ METHODOLOGY

COUNTRY BREAKDOWN



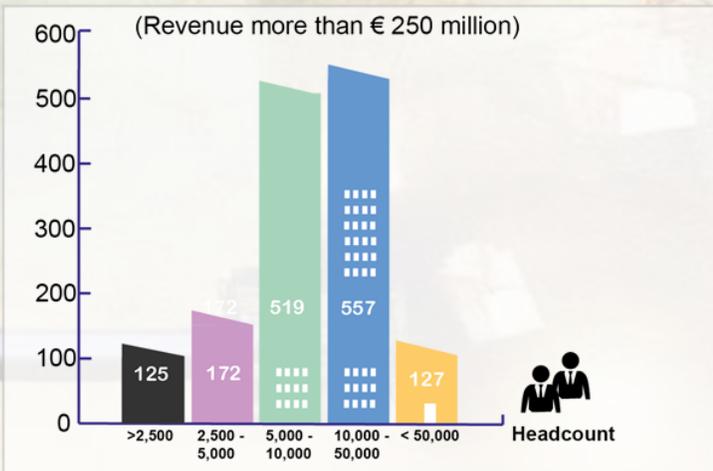
INDUSTRY BREAKDOWN



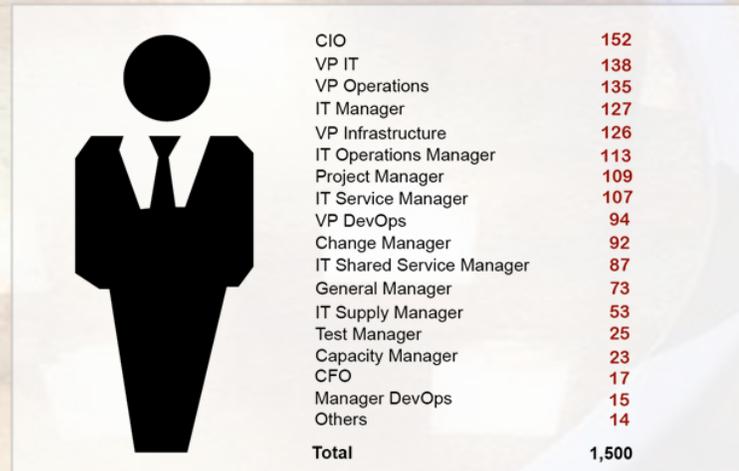
RESEARCH FACTS

- 100,000+ Data Points
- 1,500 Enterprise IT Managers
- TOP 20 Vendors
- 30+ Reports in 2020
- 40% Analyst's Opinion
- 60% Survey Results

COMPANY SIZE BREAKDOWN



JOB TITLE BREAKDOWN



WHAT TOOLS DO YOU USE TO CREATE THE VENDOR SHORTLIST?



Decision Makers use a mix of traditional and online tools to create the vendor shortlists

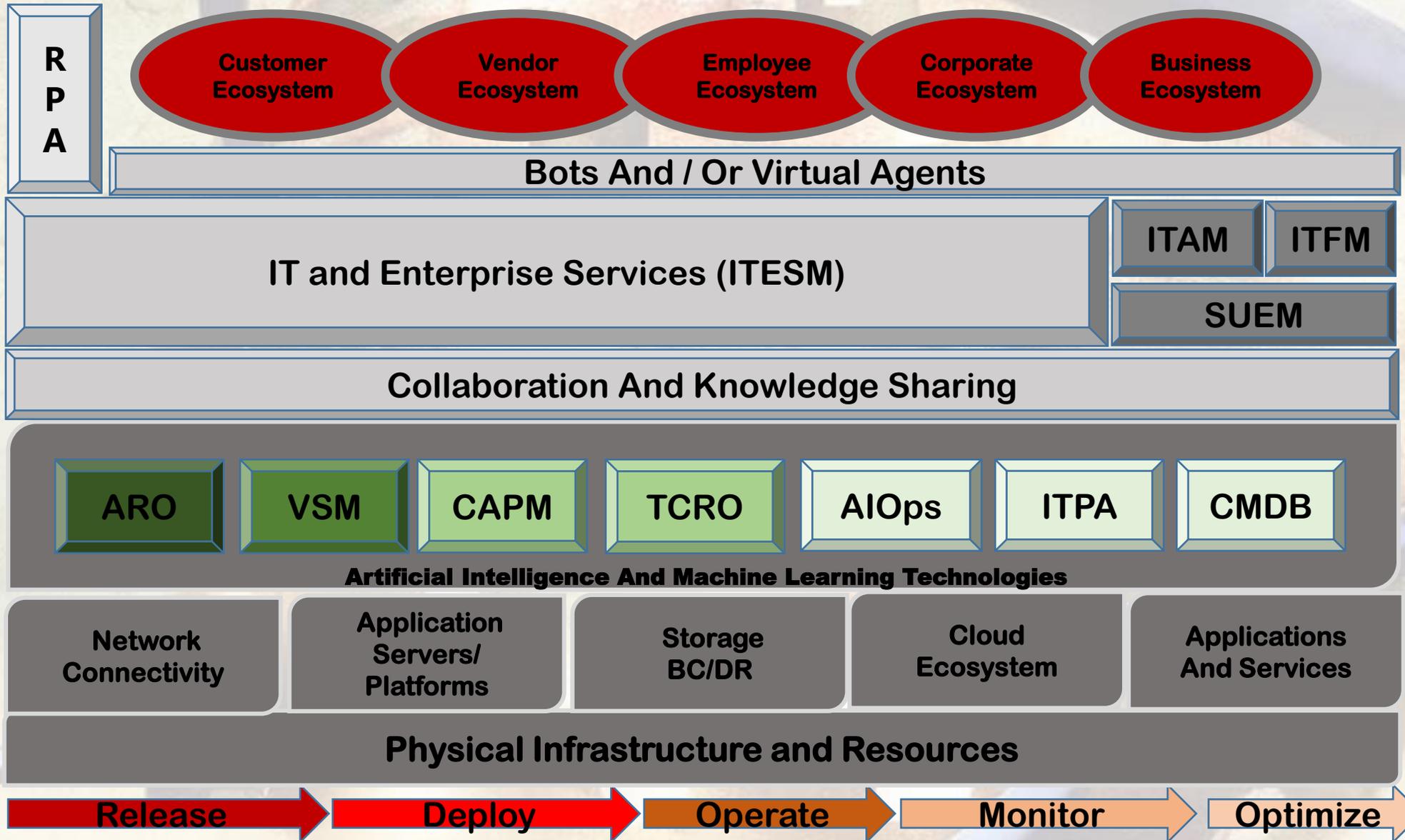
N = 3,000 Business and IT Managers with budget responsibilities.

WHAT IS ROBOTIC PROCESS AUTOMATION?

- **Robotic Process Automation (RPA) software enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions.**
- **The RPA solutions should include, but are not limited to the following functionality:**
 - **Work in attended and unattended modes**
 - **Integrate with a variety of other key areas within the enterprise**
 - **Broad application across various business areas, processes and industries**
 - **Scale up or down to meet key requirements**
 - **Customizations and add-ons possible**
 - **Various deployment models.**
- **RPA software includes bots which mimic human actions to complete repetitive and simple tasks and bots which take on more complex tasks requiring cognitive skills such as pattern recognition and decision making. The application of RPA is numerous, with use cases in finance (e.g. revenue recognition), IT (e.g. user admin), HR (e.g. onboarding) to name a few.**
- **Research In Action has evaluated RPA solutions based on customer needs and requirements and their mentioning of the top vendors and solutions globally during our survey.**



THE IT AUTOMATION MARCHITECTURE



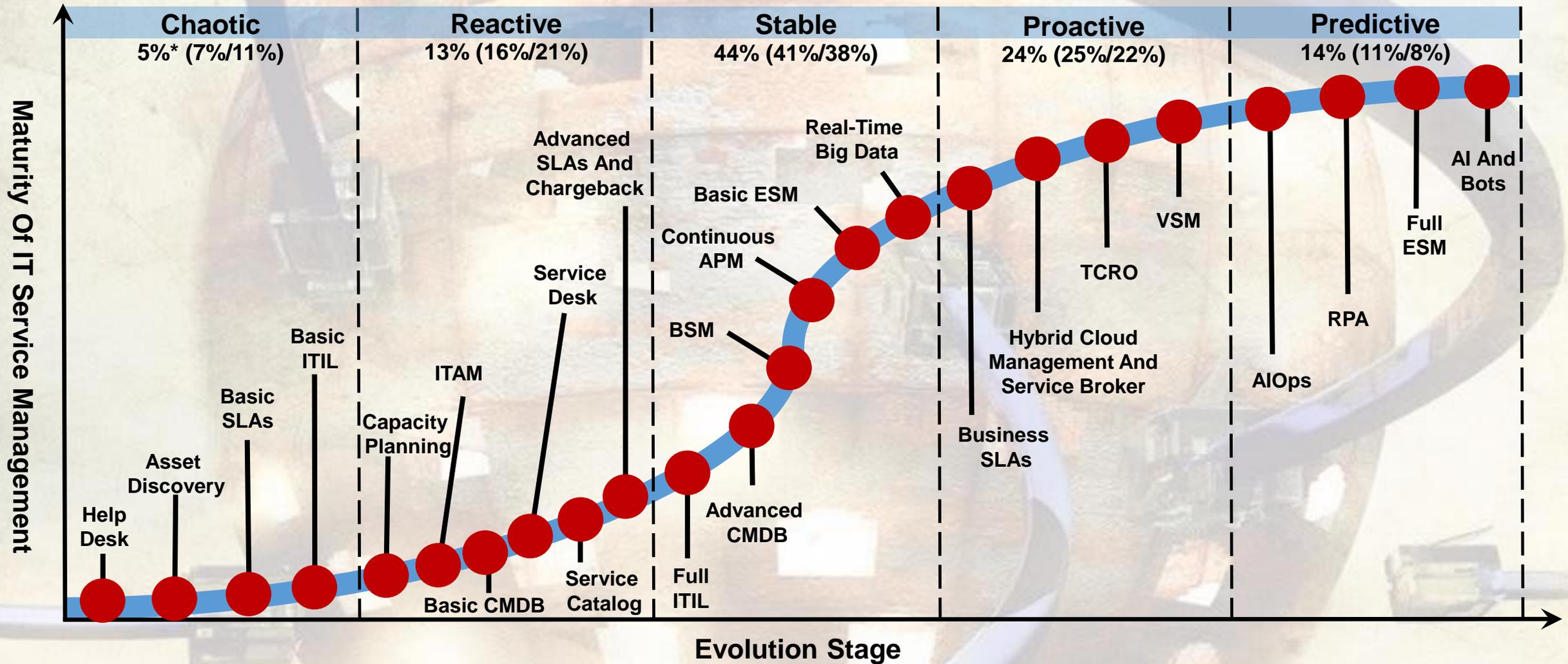
IT Automation is key to IT optimization as it allows to scale fast.

IT Automation is key to Digital transformation as it enables to predict and provide reliable services.

IT Automation will finally shift IT departments from service provider to business partner.



IT AND ENTERPRISE SERVICE MANAGEMENT MATURITY S-CURVE 2020

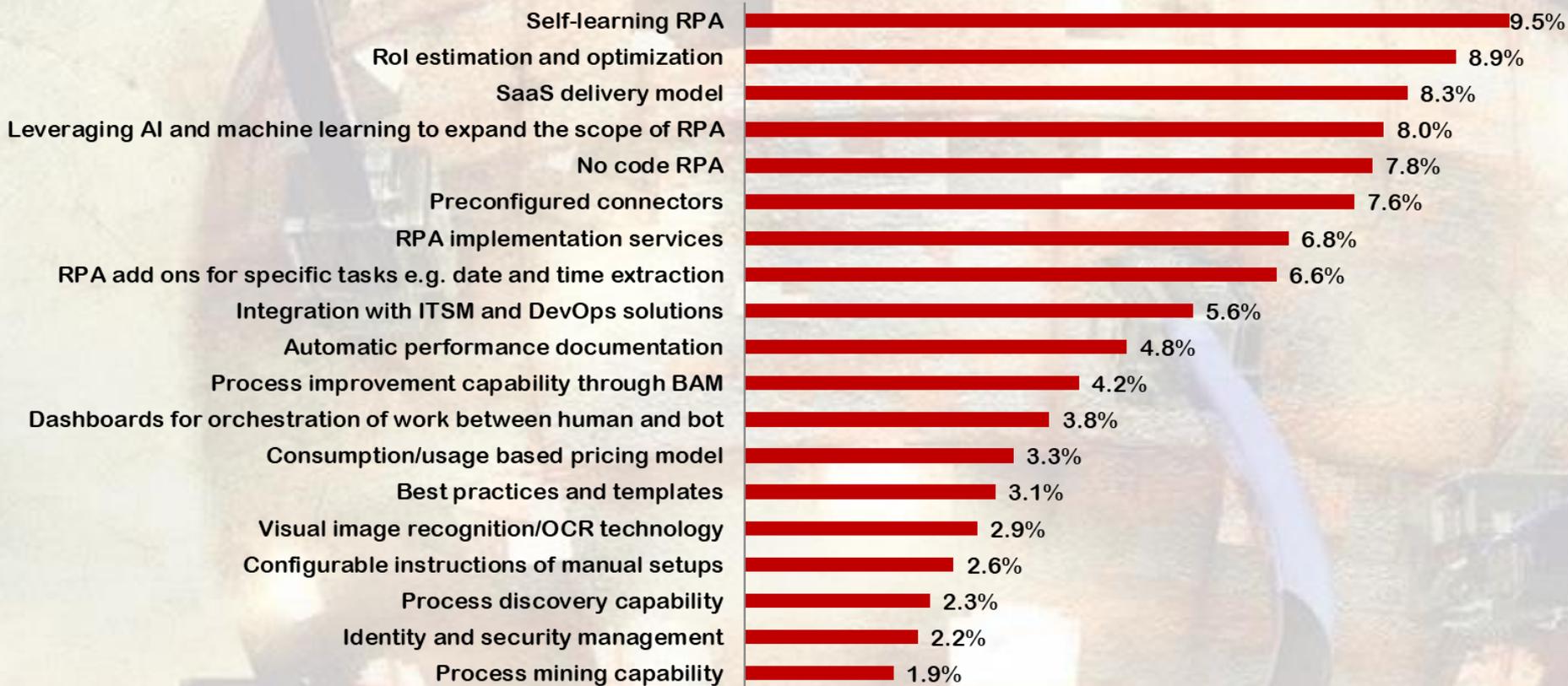


N = 2,250 IT Managers with budget responsibility.

* Categories show adoption rates, (/) show changes from 2019/2018.



RESEARCH: WHAT IS YOUR NUMBER ONE INVESTMENT AREA RELATED TO ROBOTIC PROCESS AUTOMATION IN 2020?



Self-learning will improve the manual construction of robotic behavior and with it improve the speed of implementations.

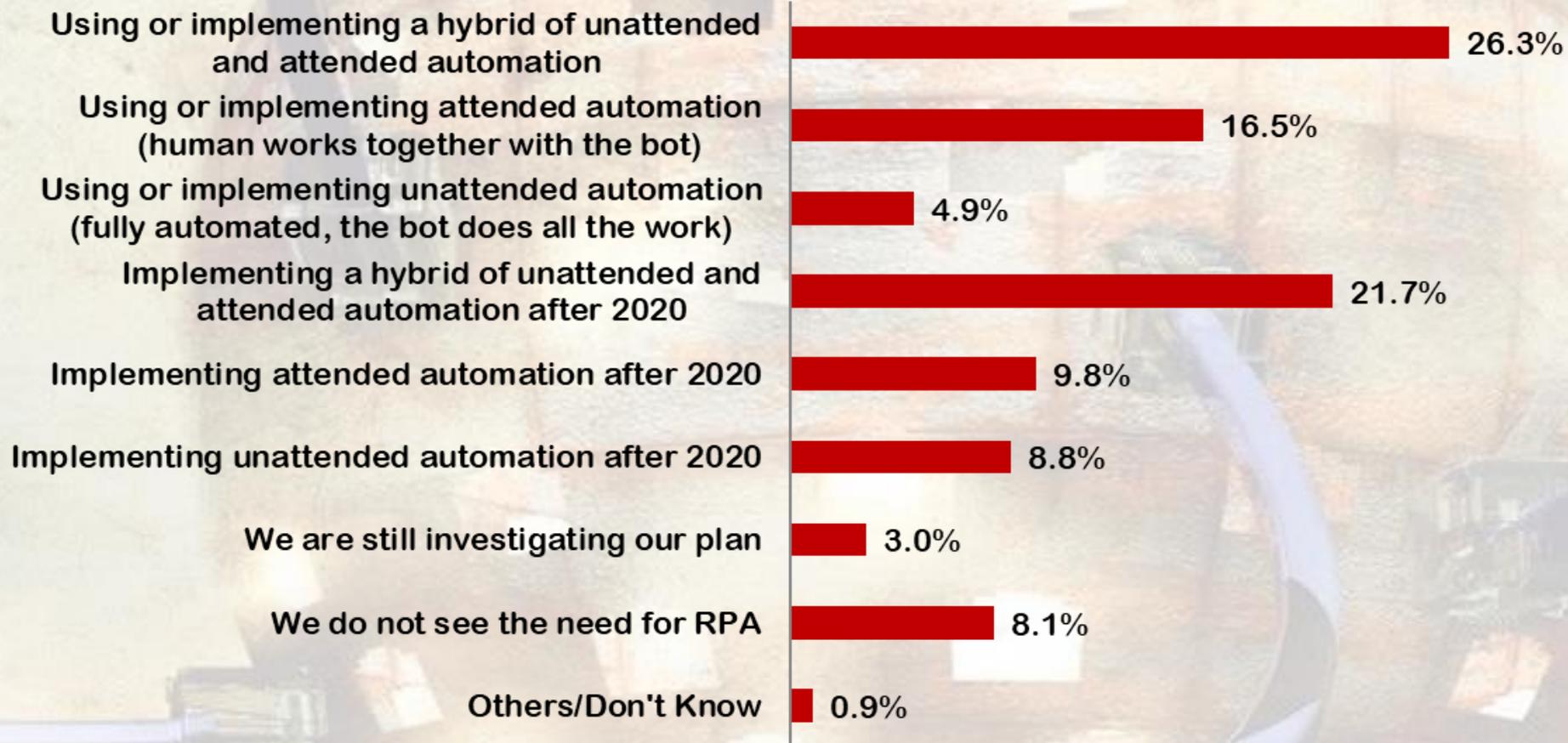
The adoption of AI and machine learning will shift process driven RPA into data-driven automation and with it enable the thinking and analysis or intelligent aspect of robotic automation.

Return on investments and scalability are typically stated as challenges around the adoption of RPA. RoI estimations and SaaS delivery models might ease these issues.

N = 1,344 Enterprise IT Managers with budget responsibilities.



RESEARCH: WHAT TYPE OF ROBOTIC PROCESS AUTOMATION SOLUTION DO YOU HAVE OR ARE YOU PLANNING TO IMPLEMENT?



Today and in the future, having both unattended and attended automation are not mutually exclusive. They both play an important role in an RPA deployment.

N = 1,500 Enterprise IT Managers with budget responsibilities.



RESEARCH: IN WHAT FUNCTIONAL AREAS ARE YOU ALREADY USING OR PLANING TO USE ROBITIC PROCESS AUTOMATION?



N = 1,500 Enterprise IT Managers with budget responsibilities.

RPA use cases are still centered around service teams such as IT service support and customer service and support functional areas where humans, systems and software robots work in conjunction to enable seamless services and support to employees and customers.

Additional use cases of automating inefficient, manual and clerical tasks are being implemented to optimize work processes.

Reduction in cost within business operations coupled with the need to shift employees towards growing parts of the company will accelerate adoption of RPA in the future.



INSIGHTS: TOP MARKET TRENDS 2020

- **Automation of manual and repetitive tasks stays top priority.** Business operation teams and IT enterprise teams are adopting RPA to automate repetitive tasks and processes. Examples such processing sales data from core systems into Excel, then presenting the finished report or within IT service desks to automate the provisioning and de-provisioning of assets to free up employee's routine, low value tasks are typical use cases.
- **Disruptive value is being recognized.** Claims of savings in labor and with it in costs of more than 60% over humans and the reduction of errors, as the tasks or processes are automated, accelerates the adoption of this disruptive technology. Enterprise leaders across all functional areas are recognizing the value of RPA and all vendors have experienced solid growth. Decreased cycle times and process risks coupled with rapid profitability increase are key benefits of RPA.
- **AI within RPA is becoming more advanced.** Leveraging Artificial Intelligence and the continuous development of processing increasingly complex data allows for the emulation of human level decision making. Some vendors are receiving funding to accelerate their development in these areas.
- **Employee resistance to adopt RPA can be overcome.** A significant amount of organizations are still hesitant with adopting RPA within business or IT functions due to employee resistance as the introduction of RPA will bring changes to employees and their responsibilities. An initial path starting and automating small and highly manual processes proofing quick wins will be needed to build momentum with key stakeholders and employees to overcome resistance. Most vendors offer free versions allowing for proof-of-concepts and current per-bot licensing models make it possible to invest into RPA one bot at the time.



INSIGHTS: TOP MARKET TRENDS 2020

- **Training, services and support will become more important over time.** RPA does not interfere with existing system of records or business applications and therefore does not require a lot of integration work. However, to leverage RPA software, individuals and teams must be trained so that deployment and implementation are meeting the expectations. To implement RPA typically involves “citizen developer” (a term first coined in 2018) which are individuals who are very close to the enterprise's operations and can determine the best use cases to leverage RPA software. These citizen developers must be trained and equipped with skills and capabilities to implement successful RPA projects.
- **Center of Excellence (COE) for Robotic Process Automation are essential.** Furthermore, citizen developers, IT oversight, security, mobile app development, other team members and topic owners should assemble into COEs to accelerate the path to innovation. This team should own the RPA lifecycle and the ongoing expansion and maintenance. Without such a COE, there might be a disconnect between the different teams in IT and business personnel regarding the level of concern over for example security and governance. RPA control rooms or management consoles which support such COEs are necessary.



VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION: THE TOP GLOBAL VENDORS 2020

VENDOR NAME	PRODUCT(S)
ANOTHER MONDAY ¹	AM Ensemble
AUTOMATION ANYWHERE	Automation Anywhere Enterprise (RPA)
AUTOMATIONEDGE ¹	AutomationEdge Robotic Process Automation
BLUE PRISM	Blue Prism v6.7 including Blue Prism Cloud
CONTEXTOR ¹	Acquired by SAP, now called SAP Intelligent RPA
CORTEX	Cortex Intelligent Automation
DATAMATICS	TruBot
HELPSYSTEMS	Automate Desktop, Automate Plus, Automate Ultimate
JIDOKA	Acquired by Appian
KOFAX ¹	Kofax RPA
KRYON	Kryon Full Cycle Automation
NICE ¹	NICE Robotic Automation
NINTEX	Nintex Workflow
PEGASYSTEMS ¹	Pega Robotic Process Automation
SERVICETRACE	ServiceTrace XceleratorOne
SOFTOMOTIVE	WinAutomation, ProcessRobot
UIPATH	UiPath Automation Platform
WORKFUSION	Intelligent Automation Cloud

This listing is alphabetical and includes all relevant Robotic Process Automation solutions which have been part of the survey.

One additional vendor with a solution in the RPA space but not included in this research due to timing of the survey is Micro Focus.

¹ These vendors did not provide a direct briefing to the Research In Action analysts.



VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION: THE TOP GLOBAL VENDORS 2020 - QUICK FACTS

VENDOR NAME	STAFF	REVENUE ¹	GROWTH	GOOD TO KNOW
ANOTHER MONDAY	< 200	< \$20 m	N.A.	Enables the future of work.
AUTOMATION ANYWHERE	> 2,500	> \$250 m	> 30% p.a.	Accelerates the digital worker strategy.
AUTOMATIONEDGE	< 100	< \$10 m	N.A.	Automates across front, middle and back-office.
BLUE PRISM	< 1,000	< \$250 m	> 30% p.a.	Blue Prism connected-RPA accelerates the digital workforce.
CONTEXTOR		Part of SAP		Contextor is now part of SAP and will help automate SAP applications.
CORTEX	< 100	< \$20 m	> 30% p.a.	Cortex intelligently automates for outcomes.
DATAMATICS	> 10,000	< \$50 m	> 30% p.a.	Datamatics drives intelligent automation by leveraging its patents.
HELPSYSTEMS	< 1,000	< \$50 m	< 20% p.a.	HelpSystems is targeting mid-market with additional focus towards security automation.
JIDOKA		Part of Appian		Appian has acquired Jidoka to accelerate its RPA presence.
KOFAX	< 1,500	< \$150 m	N.A.	Kofax automates and digitally transform end-to-end business processes.
KRYON	< 250	< \$50 m	> 30% p.a.	Kryon automates the automation with process discovery.
NICE	< 6,500	> \$1,600 m	N.A.	Delivers attended automation for human efficiency.
NINTEX	< 600	< \$200 m	< 20% p.a.	Nintex automates sophisticated process and workflow apps fast.
PEGASYSTEMS	N.A.	N.A.	N.A.	Pegasystems offers a digital transformation suite.
SERVICETRACE	< 100	< \$20 m	> 30% p.a.	ServiceTrace enables to complete RPA projects with one tool.
SOFTOMOTIVE	< 250	< \$50 m	> 30% p.a.	Softomotive empowers people and enterprises with a simplified automation journey.
UIPATH	> 2,000	< \$400 m	> 30% p.a.	UiPath tackles any kind of automation problem.
WORKFUSION	< 500	< \$100 m	> 30% p.a.	WorkFusion leverages its Artificial Intelligence DNA for intelligent automation.

¹ In the Robotic Process Automation software market.

VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION: THE TOP GLOBAL VENDORS 2020 – ADDITIONAL FACTS

VENDOR NAME	FREE VERSION	PRICING	RPA MARKETPLACE
ANOTHER MONDAY	30 DAY FREE TRIAL	N.A.	YES
AUTOMATION	30 DAY FREE TRIAL	PER PROCESS	YES
AUTOMATION EDGE	N.A.	N.A.	YES
BLUE PRISM	YES	TERM LICENSING ON A PER DIGITAL WORKER BASIS	YES
CONTEXTOR	NO	N.A.	ACQUIRED BY SAP
CORTEX	NO	TERM AND PERPETUAL, ON-PREMISE AND HOSTED, PER PROCESS COMPLEXITY, PER BUNDLE AND ENTERPRISE LICENSE	YES
DATAMATICS	30 DAY FREE TRIAL	PER BOT	NO
HELPSYSTEMS	30 DAY FREE TRIAL	SUITE	YES
JIDOKA	14 DAY FREE TRIAL	N.A.	ACQUIRED BY APPIAN
KOFAX	90 DAY FREE TRIAL	N.A.	YES
KRYON	ENTERPRISE OR COMMUNITY	SUITE OR BUNDLE MODEL	SOON
NICE	YES	N.A.	NO
NINTEX	30 DAY FREE TRIAL	PER AUTOMATED PROCESS	NO
PEGASYSTEMS	30 DAY FREE TRIAL	N.A.	N.A.
SERVICETRACE	YES	PER BOT, PAY-PER-USE, PER PROCESS	YES
SOFTMOTIVE	30 DAY FREE TRIAL	WINAUTOMATION - PER-USER/PER MACHINE ANNUAL LICENSE SUBSCRIPTION; PROCESSROBOT - PER BOT	SOON
UIPATH	UIPATH COMMUNITY EDITION	PER BOT	YES
WORKFUSION	EXPRESS	PER PROCESS	NO

VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION: EVALUATION CRITERIA

STRATEGY

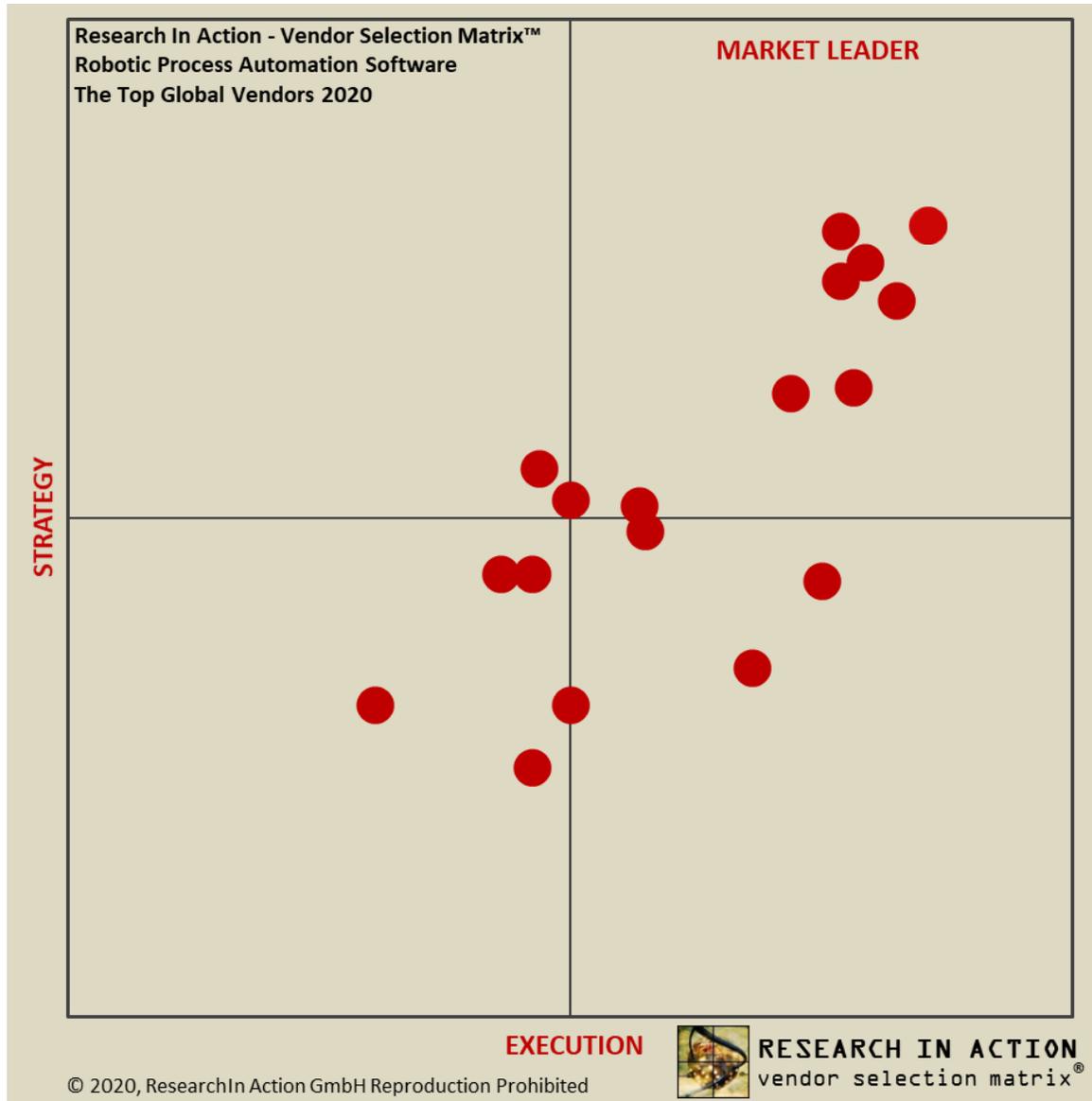
Vision & Go-To-Market	30%	Does the company have a coherent vision in line with the most probable future market scenarios? Does the go-to-market and sales strategy fit the target markets and customers?
Innovation & Partner Ecosystem	20%	How innovative is the company? How is the partner ecosystem organized and how effective is the partner management?
Viability & Execution Capabilities	15%	How likely is the long-term survival of the company in this market? Does the company have the necessary resources to execute the strategy?
Differentiation & USP	35%	Does the solution have a Unique Selling Proposition (USP) and clear differentiators?

EXECUTION

Breadth & Depth Of Solution Offering	30%	Does the solution cover all necessary capabilities expected by the customers?
Market Share & Growth	15%	How big is the market share and is it growing above market rate?
Customer Satisfaction	25%	How satisfied are customers with the solution and the vendor?
Price Versus Value Ratio	30%	How do customers rate the relationship between the price and perceived value of the solution?



VENDOR SELECTION MATRIX™ – ROBOTIC PROCESS AUTOMATION SOFTWARE



THE TOP 10 VENDORS:

1. BLUE PRISM
2. AUTOMATION ANYWHERE
3. UIPATH
4. SERVICETRACE
5. WORKFUSION
6. ANOTHER MONDAY
7. KOFAX
8. PEGASYSTEMS
9. KRYON
10. SOFTOMOTIVE

OTHER VENDORS (A-Z):

AUTOMATION EDGE
CONTEXTOR
CORTEX
DATAMATICS
HELPSYSTEMS
JIDOKA
NICE
NINTEX

THE RESEARCH IN ACTION GMBH VENDOR SELECTION MATRIX™ METHODOLOGY

Vendor Selection Matrix™ Disclaimer:

The Vendor Selection Matrix™ is a primarily survey-based methodology for comparative vendor evaluation. Research In Action GmbH does not endorse any vendor, product or service depicted in our research publications, and does not advise technology users to select only those vendors with the highest ratings. The information contained in this research has been obtained from both enterprise as well as vendor sources believed to be reliable. Research In Action GmbH's research publications consist of the analysts' opinions and should not be considered as statements of fact. The opinions expressed are subject to change without further notice. Research In Action GmbH disclaims all warranties, expressed or implied, with respect to this research, including any warranties of merchantability or fitness for a particular purpose.

About:

Research In Action GmbH is a leading independent information and communications technology research and consulting company. The company provides both forward-looking as well as practical advice to enterprise as well as vendor clients.

APPENDIX: IT AUTOMATION MARKET TEXTURE DEFINITIONS

- **AI Powered Chatbot Platforms** which are used to build applications that answer questions, provide advice and/or recommendations using natural language processing and other dialog related technologies.
- **Artificial Intelligence and Machine Learning (AI/ML)** are both technologies and are leveraged in automation solutions. Artificial intelligence (AI) is the ability of a computer program or machine to think and learn (AI can mimic human cognition). Within IT Automation AI is used to correctly interpret a variety of data, to learn from such data, and to use those learnings to achieve specific goals and tasks through flexible adaptation. Machine learning enables computers with the ability to learn without being programmed (explicit algorithms). It explores the study and construction of algorithms which can learn and make predictions on data. The algorithms follow programmed instructions or can make predictions or decisions based on the data. Machine learning is used when explicit algorithms cannot be done (e.g. computer vision, search engines, optical character recognition).
- **Artificial Intelligence for Operations (AIOps)** solutions equip IT enterprise teams with analysis of volumes and categories of data to improve key processes, tasks and decision making. The adoption of these tools automates the ingestion of fast volumes of data; leverage machine learning to analyze the data, present findings to either predict or alert on issues, and leverage the knowledge for automation or decision making.
- **Application Release Orchestration (ARO)** solutions equip IT enterprise organizations and their teams with the automation of the software deployment cycle across hybrid technology environments.
- **Continuous Application Performance Management (CAPM)** software solutions continuously identify issues around performance and availability of software applications, IT and enterprise services. The solutions strive to proactively detect and diagnose application performance problems and health and enable a situational awareness of application related issues.
- **Enterprise Service Management (ESM)** is a category of business management software - typically a suite of integrated applications that a service organization uses to capture, manage, save and analyze data critical to their service business performance. It automates service offerings across functional areas such as (1) Human resources, (2) Vendor management, (3) Technical services, (4) Field services, (5) Financial management and (6) Shared services organizations.
- **IT Asset Management (ITAM)** software manages the full lifecycle of IT assets which typically includes all software, hardware, networking, cloud services, and client devices. In some cases, it may also include non-IT assets such as buildings or information where these have a financial value and are required to deliver an IT service. IT asset management can include operational technology (OT), including devices that are part of the Internet of Things. These are typically devices that were not traditionally thought of as IT assets, but that now include embedded computing capability and network connectivity.
- **IT Financial Management (ITFM)** software enables the accurate and cost-effective management of IT assets and resources with the aim to plan, control, recover (or overall manage) costs which are occurring while providing IT and Enterprise Services to the organization.
- **IT Service Management (ITSM)** refers to the entirety of activities – directed by policies, organized and structured in processes and supporting procedures – that are performed by an organization to plan, design, deliver, operate and control Information Technology (IT) services offered to customers. It is thus concerned with the implementation of IT services that meet customers' needs, and it is performed by the IT service provider through an appropriate mix of people, process and information technology.
- **Robotic Process Automation (RPA)** solutions enable the automation of tasks, processes and procedures which are normally conducted by a human. RPA solutions create software robots that mimic human actions. Typically, these are tasks that a human would do. (Ro)Bots and Virtual Agents are part of RPA solutions.
- **Secure Unified Endpoint Management (SUEM)** software enables the management and securing of mobile applications, content, collaboration and provides for the management of all endpoints like smartphones, tablets, laptops, printers, ruggedized devices, Internet of Things (IoT) and wearables.
- **Technology Cost and Resource Optimization (TCRO)** software enables the planning, management and visibility of the supporting and required business and IT technology resources from a cost and capacity perspective by visualizing, planning, prioritizing and optimizing the usage and demands of technology resources (people, processes and technologies) for the enterprise.
- **Value Stream Management (VSM)** software solutions capture, visualize, and analyze the flow of work across the entire agile software delivery project. The capabilities include end-to-end visibility, traceability and governance over the entire process and help to plan, track, and steer work at the team, program, portfolio, and enterprise levels. It includes the people working on a project, the systems which are operated and leveraged, and the flow of information and materials between teams. It enables the measurement of speed and quality for digital transformations.



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