

Competitive Landscape: Robotic Process Automation Software

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RPA is one of the fastest-growing segments in the enterprise software market, with a rising competitive bar and many new entrants. Ease of use, partnership networks and software ecosystems are the key strategic areas in which to win mind share and ultimately market share.

Overview

Key Findings

- The 10 largest RPA software vendors account for over 70% of market share in the RPA market.
- Process discovery and process mining tools are rapidly becoming “table stakes” for RPA providers. Two-thirds of major RPA vendors now claim to have a solution, either self-built or via a commercial partnership, that provides business users with the process insight to be able to deploy more RPA.
- RPA market competitors are increasing the scope of related technologies in line with the trend toward hyperautomation by including document ingestion, process discovery and workforce process orchestration management tools. Vendors are also evolving their RPA cloud offerings, including iPaaS, SaaS, managed services and BPaaS.

Recommendations

To succeed in the RPA marketplace, product managers at RPA software providers should take these steps:

- Increase brand awareness by gaining major funding initiatives and/or significant IT services partnerships to be able to combat the market dominance of leading players. Access to a huge established customer base, such as Microsoft and SAP, would also help.
- Differentiate your RPA software by adding business or IT process best practices, process metrics, benchmarking, and measures of process efficiency and effectiveness.
- Evaluate building converters from commercial process discovery tools that can work to generate preconfigured robot routines from your RPA product code libraries.

- Collaborate with business process outsourcers, business consultants and system integrators (SIs) to partner on best-practice vertical and horizontal process insights.
- Focus on creating strong software partnerships within the software ecosystem for optimizing competing via hyperautomation.

Strategic Planning Assumptions

By year-end 2023, 90% of large and very large organizations will have deployed some form of robotic process automation (RPA), up from 55% in 2019.

By 2022, 80% of organizations that deployed RPA will introduce artificial intelligence (AI), including machine learning and natural language processing algorithms for improving business processing activities.

Analysis

Robotic process automation is a digital enablement technology that predominantly leverages a combination of user interface (UI) and surface-level features to create scripts that automate routine, predictable data transcription work. RPA tools perform “if, then, else” statements on structured data, typically using a combination of UI interactions, or by connecting to APIs to drive client servers, mainframes or HTML code. An RPA tool operates by mapping a process in the RPA tool language for the software “robot” to follow, with runtime allocated to execute the script by a control dashboard. For more on the definition of the technology, see [“Magic Quadrant for Robotic Process Automation Software.”](#)

From a market perspective, in both 2018 and 2019, RPA proved to be the fastest-growing software segment. It grew 63.1% in 2018 and 62.9% in 2019 compared with the 13.5% and 11.5% growth, respectively, of the overall enterprise software market (see [“Market Share: All Software Markets, Worldwide, 2019”](#)).

RPA’s value proposition promises a plethora of benefits, such as reduced operating costs, process improvements, optimization of resources toward higher-value functions, and improved productivity, compliance, customer service and quality. These are useful benefits primarily for large, complex organizations, which, as a consequence, have been key early adopters of RPA. The tipping point was reached around 2015 when RPA started to enter mainstream adoption. It is still expanding and we expect that, through 2024, even the most conservative late adopters, notably midsize and small organizations in typically laggard IT adopter industries, will begin experimenting with a form of RPA, possibly in the form of cloud.

Competitive Situation and Trends

This section explores the two key issues shaping the competitive landscape:

- **Share of the RPA competitive landscape in 2020 and beyond.** Currently, the main players dominate the market with strong brand awareness and major software and IT services partnership deals. But new entrants are still coming, and more are expected.
- **Solution offering expansion.** Buyers want to learn about their business processes so that they can automate them more with RPA. Consequently, competitors are expanding their portfolio to hyperautomation to compete more effectively. It started with data ingestion tools such as optical character recognition (OCR) with machine learning, but it is focused on process discovery and process mining and will continue through the hyperautomation collection of technologies.

Table 1 provides examples of recent acquisitions that RPA vendors have made to expand their hyperautomation capabilities.

Table 1: Examples of Recent Acquisitions to Expand Capabilities in Hyperautomation

Acquirer	Company Acquired	Activity Performed	Impact/Intended Outcome
UiPath	ProcessGold, StepShot	Process insight and process mining	Improve prospect confidence of ability to derive business impact from RPA
Appian	Jidoka	RPA	Increase the range of hyperautomation technologies available to clients
Automation Anywhere	Klevops	Case handling	Improve prospect confidence of usability of RPA
Blue Prism	Thoughtonomy	Cloud preintegrated chatbots, document ingestion and RPA	Increase the range of hyperautomation technologies available to clients

Source: Gartner (May 2020)

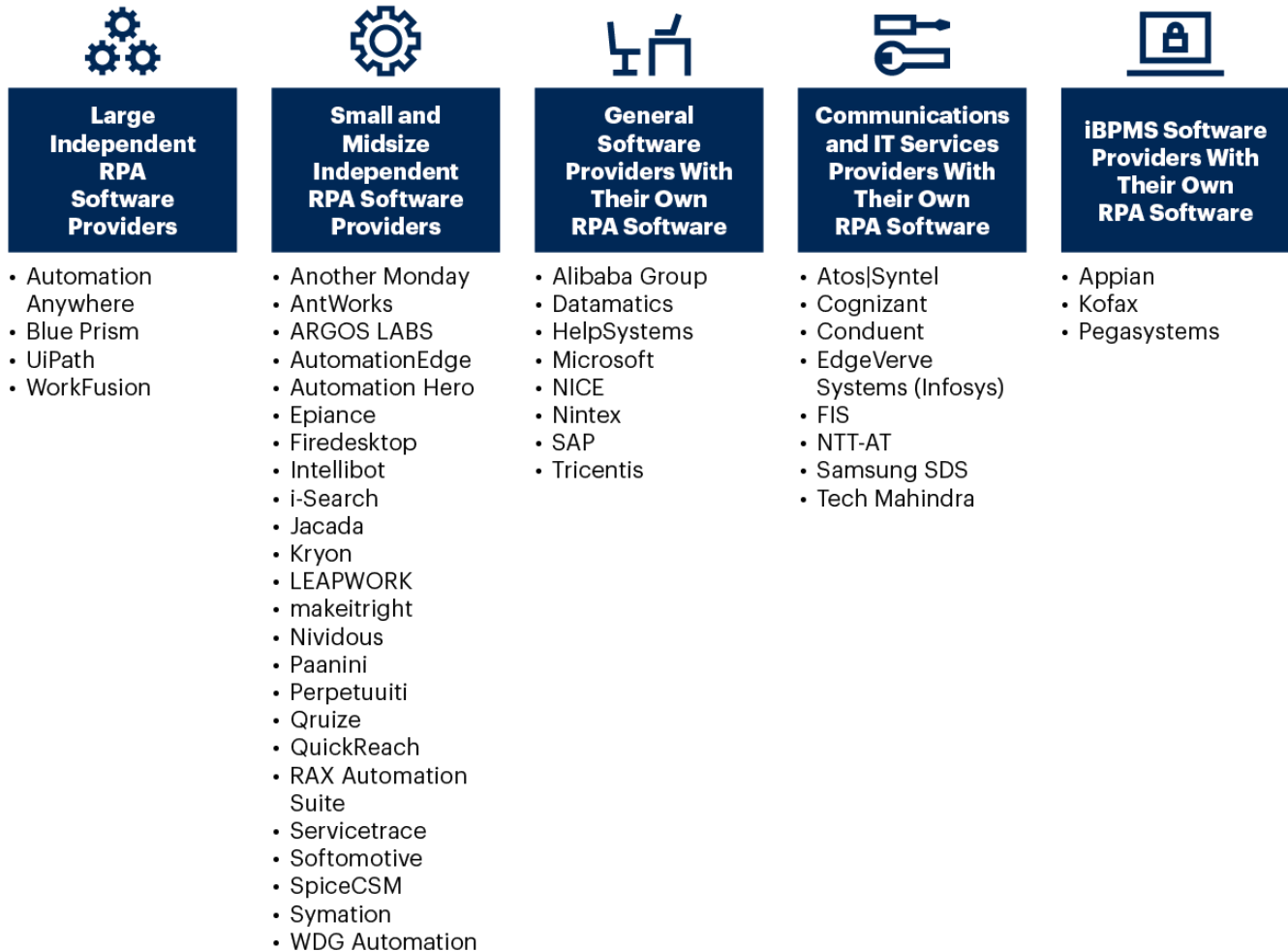
Share of the RPA Competitive Landscape

The market is dominated by eight major market players that have the needed breadth and depth of capabilities to make them viable for a typical global deployment. They are Automation Anywhere, Blue Prism, EdgeVerve Systems, Kofax, NICE, Pegasystems, UiPath and WorkFusion. At the same time, the market is still fairly fragmented compared with a typical software market. The top five vendors (Automation Anywhere, Blue Prism, NICE, Pegasystems and UiPath) account for 47% share in the RPA software market.

RPA products are currently offered by around 40 players, including niche and small geographically focused providers, as shown in Figure 1.

Figure 1: RPA Competitive Landscape

The RPA Competitive Landscape



Source: Gartner
 iBPMS = intelligent business process management suite
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Solution Offering Expansion

This crowded market has made it more difficult to differentiate. In fact, from a fundamental technology perspective, not only must vendors focus on the product roadmap, but they must also be able to effectively communicate the value of their product to the appropriate target audience. This includes not just line of business (LOB) managers (and when RPA is scaling up in the organization, the COO and CFO), but the CIO as well.

In fact, once organizations have moved beyond simple RPA deployments, there is a critical need for multidisciplinary governance and coordination across business units, IT, security, sourcing and assurance functions. Hence, vendors have also been challenged to educate their customers on how their RPA offering and ecosystem can bridge internal silos and support business priorities.

This is set to be the biggest challenge of 2020: to show the ability to support business and IT teams effectively and in doing so, foster an initial sale and then the expansion of that sale and account growth.

Only the more advanced RPA software providers have demonstrated this comprehensive ability. Meanwhile, most other vendors limit their go-to-market actions to highlighting the virtues of their offerings.

See Table 2 for a listing of providers in this market.

Table 2: List of RPA Software Providers

Vendor	Product	Headquarters	Private or Public	URL
Alibaba Group	Aliyun RPA	China	Public (NYSE: BABA)	cn.aliyun.com/product/codestore
Another Monday	AM Muse	Germany	Private	www.anothermonday.com
AntWorks	ANTstein SQUARE	Singapore	Private	www.ant.works
Appian (acquired Novayre Solutions, developer of the Jidoka RPA platform)	Appian RPA (the rebranded Jidoka)	U.S.	Public (Nasdaq: APPN)	www.appian.com/platform/robotic-process-automation-rpa
ARGOS LABS	ARGOS Low-code/RPA ARGOS RPA+	U.S.	Private	www.argos-labs.com
Atos Syntel	SyntBots	France	Public (EPA: ATO)	www.atos-syntel.net

Automation Anywhere	Automation Anywhere Enterprise (AAE)	U.S.	Private	www.automationanywhere.com
Automation Hero	Automation Hero	U.S.	Private	automationhero.ai
AutomationEdge	AutomationEdge	U.S.	Private	automationedge.com
Blue Prism	Blue Prism	U.K.	Public (LON: PRSM)	www.blueprism.com
Conduent	Conduent Automation Suite	U.S.	Public (Nasdaq: CNDT)	www.conduent.com
Datamatics	TruBot	India	Public (NSE: DATAMATICS)	www.datamatics.com
EdgeVerve Systems (a wholly owned subsidiary of Infosys)	AssistEdge	India	Public (NYSE: INFY)	www.edgeverve.com
ElectroNeek	ElectroNeek RPA Platform	U.S.	Private	electroneek.com
Encoo	Enterprise Intelligent RPA Platform	China	Private	www.encoo.com
Epiance	EpiGenie RPA	India	Private	epiPLEX500.com

Firedesktop	Flowbot	Italy	Private	www.firedesktop.com/en/firedesktop
FIS	iAutomate	U.S.	Private	www.fisglobal.com
GridOne	AutomateOne	South Korea	Private	www.gridone.co.kr
HelpSystems	HelpSystems Automate	U.S.	Private	www.helpsystems.com
HPA, A Cognizant Company	HPA Robots-as-a-Service	U.S.	Private	hpa.services
Intellibot	Intellibot Platform	India	Private	intellibot.io
Shanghai i-Search Software	i-Search Robotic Process Automation (iS-RPA)	China	Private	www.i-search.com.cn/en/about.html
Jacada	csRPA	Israel	Public (Nasdaq: JCDA; OTCMKTS: JCDAF)	www.jacada.com
Kofax	Kofax RPA (formerly Kapow)	U.S.	Public (Nasdaq: KFX)	www.kofax.com
Kryon	Kryon RPA	U.S.	Private	www.kryonsystems.com

LEAPWORK	LEAPWORK Automation Platform	Denmark	Private	www.leapwork.com
makeitright	PowerFarm RPA	Poland	Private	makeitright.pl
Microsoft	Microsoft Power Automate	U.S.	Public (Nasdaq: MSFT)	flow.microsoft.com/en-us
NICE	NICE Robotic Process Automation	Israel	Public (Nasdaq: NICE)	www.nice.com
Nintex (acquired EnableSoft)	Nintex RPA	U.S.	Private	www.nintex.com
Nividous	Nividous RPA	India	Private	nividous.com
NTT-AT and NTT DATA	WinActor	Japan	Private	www.ntt-at.com
Paanini	Jiffy Intelligent Automation platform	India	Private	paanini.com
Pegasystems	Pega Robotic Automation and Pega Workforce Intelligence	U.S.	Public (Nasdaq: PEGA)	www.pega.com
Perpetuuiti	Ops-Central	India	Private	www.ptechsoft.com
Qruize	Qruize Magic	U.S.	Private	www.qruize.com

QuickReach	QuickReach RPA	Philippines	Private	www.quickreach.co/rpa
RAX Automation Suite	RAX Automation Suite	Philippines	Private	www.raxsuite.com/rax-suite
Samsung SDS	Brity Works	South Korea	Public (KRX: 018260)	www.samsungsds.com/global/en/solutions/off/brity/brity.html
SAP (acquired Contextor)	SAP Intelligent Robotic Process Automation	Germany	Public (NYSE: SAP)	www.sap.com
Servicetrace	XceleratorOne (X1) Servicetrace Robotic Process Automation	Germany	Private	www.servicetrace.de
Softomotive	WinAutomation	U.K.	Private	www.softomotive.com
SpiceCSM	Process Automation	U.S.	Private	www.spicecsm.com
Symation	CheckMATE RPA	South Korea	Private	www.symation.co.kr
Tech Mahindra	Unified NexGen Operations (UNO)	India	Public (NSE: TECHM)	www.techmahindra.com/cwce.html
Tricentis	Tricentis RPA	Austria/U.S.	Private	www.tricentis.com

UiPath	UiPath	U.S.	Private	www.uipath.com
Verint	Verint Robotic Process Automation	U.S.	Public (Nasdaq: VRNT)	www.verint.com
WDG Automation	WDG Automation	Brazil	Private	www.wdgautomation.com/?lang=en
WorkFusion	Smart Process Automation (SPA) and RPA Express	U.S.	Private	www.workfusion.com
Note: This list of providers is representative and not exhaustive.				

Source: Gartner (May 2020)

The Commercial Realities of Megavendors Entering the Market Have Yet to Be Felt

Major software companies are acquiring, building or investing in RPA functionality, as shown in Table 3. In 2019, Microsoft announced its entry into this space. Similarly, CapitalG has invested in UiPath, and SAP acquired Contextor in 2018 and is now in the early stages of ramping its sales activity with an integrated offering. Other prominent software companies are also considering similar forays.

Partnering with RPA providers is also a popular growth strategy (e.g., IBM with Automation Anywhere and Blue Prism, and Oracle with UiPath) to benefit from this growth wave and customer demand.

Table 3: Megavendors' Position on RPA

Megavendor ↓	RPA Capabilities ↓
Adobe	None
Amazon	None

<i>Megavendor</i> ↓	<i>RPA Capabilities</i> ↓
Dell EMC	None
Google	CapitalG (formerly Google Capital) funded UiPath
IBM	Partnership with Automation Anywhere and Blue Prism
Microsoft	Entered the market with attended automation in 2019; partnership with Automation Anywhere
Oracle	Partnership with UiPath
Salesforce	Salesforce Ventures funded Automation Anywhere
SAP	Acquired Contextor
VMware	None

Source: Gartner (May 2020)

Many Vendors Are Trying to Establish Themselves Toward Hyperautomation

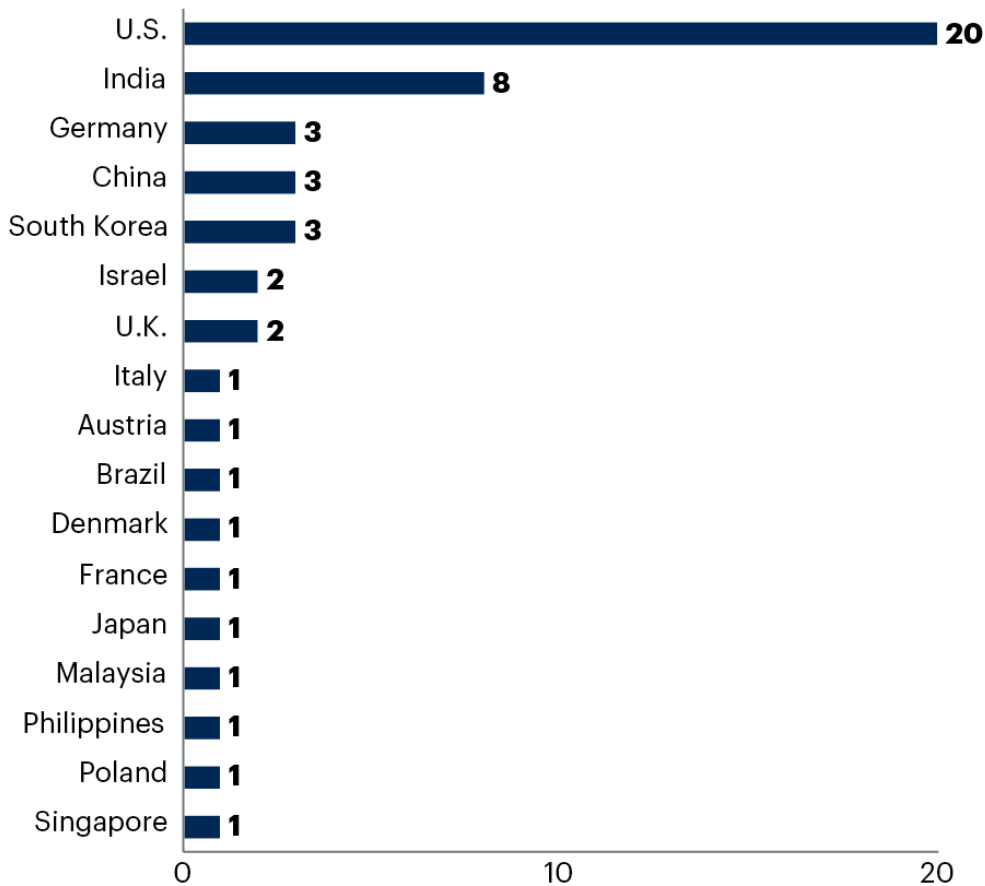
The core areas for RPA competition focus on basics such as the orchestrator/dashboard, development environment, efficiency of client/server architecture and/or cloud capabilities, and ability to integrate with a wide range of enterprise software products beyond the surface level.

As organizations try to make sense of all the key technologies and how the puzzle pieces fit together, many RPA software vendors are trying to establish themselves beyond the original “core” task-based offerings.

Figure 2 shows the number of RPA vendors by country.

Figure 2: Number of Major RPA Vendors by Country, 2020

Number of Major RPA Vendors by Country, 2020



Source: Gartner
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Gartner expects the RPA market to look very different three years from now. RPA providers will improve their ability to work with other technologies that can supplement and/or manage these automations. Vendors are also beginning to better articulate business cases based on business value, not just full-time equivalent (FTE) reduction. Examples include achieving better compliance to regulations, streamlined onboarding of clients in adherence to know your customer (KYC) regulations, and onboarding employees or onboarding suppliers.

Digital business demands are driving RPA evolution, as organizations are looking for straight-through processing. RPA continues to evolve as new vendors spot opportunities to combine RPA's easy integration with offerings in the fields of event stream processing, real-time analytics, web-scale, in-memory computing and real-time context-aware decision support. The other dimensions driving innovation and business development for RPA are around machine learning, natural language processing and OCR, and chatbots.

In the endeavor to expand, RPA software vendors are seeking to complement core RPA offerings with five additional areas with a varying degree of success. The five areas currently attracting the most attention and investment are:

- Process mining (also referred to as process discovery or e-process mining)
- Ingestion engine (OCR, computer vision and many other technologies)
- Analytics
- User experience
- Machine learning

Gartner refers to the collective functionality as “Complemented RPA” (CoRPA). However, the dilemma is that all these puzzle pieces are not always easy to connect. And it will need much more than technology. There must be more of an overarching view of the organization’s technology for transformation.

Hyperautomation Brings Emphasis to the Vendor Ecosystems

Hyperautomation is one of the most pervasive trends in Gartner’s top 10 strategic technology trends for 2020 and refers to an initiative that has been widely discussed across a significantly large number of enterprises’ digital journeys. Hyperautomation refers to the combination of automation tools with multiple machine learning applications and packaged software used to deliver work.

RPA is just one subset of the key technologies helping to drive hyperautomation. Alongside RPA are intelligent business process management suites (iBPMs), integration platform as a service (iPaaS) platforms and decision management systems. Between them all, they provide a robust toolbox of technologies that enable hyperautomation ambitions, and they can hardly be offered by one single provider.

It becomes paramount, therefore, for RPA vendors to have a proven network of partners and the ability to be seen as a leader in an ecosystem of providers that can effectively fulfill the hyperautomation needs of clients. These ecosystems must include IT services providers as well as cloud and software providers.

RPA Cloud Offerings Are Still Embryonic

There are several versions of the way RPA can be used with cloud.

RPA PaaS (rpaPaaS) (see [“Platform as a Service: Definition, Taxonomy and Vendor Landscape, 2019”](#)) is a set of public-cloud-hosted services, paid for with a subscription, that allow the runtime “bot” to simulate a person utilizing a user interface (UI) or any other integration requirement. RPA services can integrate existing applications, build light workflows, or be used to add new capabilities to applications without altering the application code. Major RPA vendors with examples of these offerings include Automation Anywhere (Automation Anywhere Enterprise A2019), EdgeVerve (AssistEdge RPA), and Fujitsu (RPA-as-a-Service). Several other players also have these offerings, such as Another Monday, AutomationEdge, Jidoka (now Appian),

Servicetrace, Thoughtonomy (now Blue Prism) and WorkFusion (RPA Express). The offerings are flourishing, but the revenue they currently generate is only a very small fraction of overall RPA software revenue: that is, it's an area to look at closely but not yet a significant market mover.

Competitive Profiles

This section provides a short profile of the eight selected RPA providers that have been identified based on a combination of market size (see [“Market Share Analysis: Robotic Process Automation, Worldwide, 2018”](#)) and a contextual above-average Ability to Execute as defined by the most recent Magic Quadrant (see [“Magic Quadrant for Robotic Process Automation Software”](#)). Exclusion of the RPA service providers studied in this research does not in any way reflect on the quality or credibility of the company.

Vendors are listed in alphabetical order.

Automation Anywhere

Product or Portfolio Overview

Founded in 2003, Automation Anywhere is based in San Jose, California, counting more than 2,600 employees as of December 2019, and approximately 20% of those in product development. It is one of the most visible pure players in the RPA domain, setting the tone through extensive marketing and customer engagement efforts, an articulated partner ecosystem, and strong investor backing. Following its Series A funding round of \$550 million in November 2019, Automation Anywhere closed its Series B funding round of \$290 million at a \$6.8 billion valuation, led by Salesforce Ventures.

Automation Anywhere Enterprise (AAE) is the company's core platform with integrated products including IQ Bot, Bot Insight, Bot Store, Discovery Bot and Mobile App.

How Automation Anywhere Competes

Strategic Direction: Automation Anywhere competes with an “automation in a box” platform with process discovery, orchestration, RPA, AI and analytics complemented by its partner ecosystem to fill out broader functionality. Extended benefits for partners and customers are delivered through its Bot Store marketplace, the largest in the industry, with over 1,000 bots submitted and more than 800 in production.

Automation Anywhere's marketing message emphasizes that its product is accessible to businesspeople. In common with other platforms that cover such a broad spectrum, script developers need to work with a vast array of components – each of which can require specialized configuration.

Claimed Differentiation: Automation Anywhere boasts a highly scalable, AI-powered, secure, cloud-native, microservices- and container-based architecture, a purely web-based bot creator, a modern UI, and a side-by-side view of code and process. Its Attended Automation 2.0 promises to work well

for individual, team and large contact center environments, with centralized control and governance. The company bases its market traction on its vertical industry strategy with one of the industry's largest customer success teams and a sizable network of technology partners, including Salesforce, Microsoft, IBM (OEM) and Workday.

Geography: Automation Anywhere has over 40 offices across the globe and customers in 90 countries, with a stronghold in the U.S. from where it derives around half its revenue. Other key geographies are India, the U.K., Japan, Australia and the Latin America region.

Industry Verticals: Key areas of traction for Automation Anywhere are banking, financial services, insurance and securities, manufacturing, retail, professional services, energy and utilities, and healthcare.

Typical Customer Size: Large enterprises are typical customers. Automation Anywhere has over 3,900 enterprise clients.

Blue Prism

Product or Portfolio Overview

Blue Prism was founded in 2001. It is based in Warrington, England, with more than 1,000 employees globally (as of 31 October 2019), approximately half of whom are focused on business development and sales. It is credited with being one of the first vendors to describe RPA as a "market," and today it is one of the few publicly traded pure-play RPA providers. In 2019, Blue Prism acquired Thoughtonomy, a SaaS-based integrated automation platform (which has recently been rebranded Blue Prism Cloud). The product portfolio is centered around the Blue Prism Platform (now on version 6.7) and cloud offerings (Blue Prism Cloud Hub, Interact and IADA).

How Blue Prism Competes

Strategic Direction: Blue Prism has a large implementation, technology and consulting partner ecosystem, with software partners enabled to augment the core platform with capabilities such as decision management, advanced analytics, unstructured data support and process mining.

The company has a strong verticalization strategy with industry-focused experts, campaigns, website navigation and partners. This has resulted in 42 industry solutions with at least 10 customers each.

Claimed Differentiation: Blue Prism emphasizes ease of use and scalability of the platform as the building blocks of a Blue Prism process that are all reusable and centrally governed. Also, AI integration is a key feature, with the AI component downloadable from the Digital Exchange and able to be dragged into a process for immediate use. Attention to compliance and security (data integrity, nonrepudiation and audit trail) are also characteristics highlighted by Blue Prism as differentiators. The platform meticulously logs every process step and change in process, ensuring compliance in accordance with governing bodies and internal policies.

Geography: One-third of Blue Prism business is generated in the U.S., followed closely by its native U.K. market. Other countries of traction include Australia, Germany, Sweden and France.

Industry Verticals: Financial services (banking and securities and insurance) collectively represent around half the business, followed by communications, media and services. Other vertical industries worth mentioning include manufacturing and natural resources, healthcare, and retail.

Typical Customer Size: From the beginning, it has focused on supporting enterprisewide deployment, balancing the democratization of automation development with the governance tooling needed for long-term success. Blue Prism's stated vision is a Digital Workforce for Every Enterprise.

EdgeVerve Systems

Product or Portfolio Overview

Founded in 2014 and based in Bengaluru, India, EdgeVerve has approximately 1,350 employees, with more than 400 on its R&D team. EdgeVerve is a wholly owned subsidiary of Infosys, and thanks to this affiliation, it has access to global client relationships with many primary buyers of RPA in more than 50 countries. Alongside its RPA product, AssistEdge, the company also delivers Infosys Nia — a set of components focused on machine learning and AI. All components are licensed and priced separately.

How EdgeVerve Systems Competes

Strategic Direction: EdgeVerve's engagement model is designed to leverage the existing SI and outsourcing relationships of Infosys. That provides a quick advantage and positions EdgeVerve well to grow its business at the expense of incumbent leaders in this market.

EdgeVerve has a relatively strong vision for AI and machine learning. It exhibits a mature and nuanced understanding of the opportunities in the RPA market.

Claimed Differentiation: EdgeVerve focuses its message on the differentiation of its holistic product portfolio (powered by the cognitive marketplace) and the native AI platform and contextual intelligence, which empowers human workers with contextual insights, to identify process redesigning opportunities. The platform is marketed as secure and scalable, as is its cloud rendition.

Geography: The bulk of activity is generated in the U.S., followed at a distance by Australia, Germany, the U.K. and France.

Industry Verticals: EdgeVerve derives major industry traction in communications, media and services, followed by retail. Other major areas include banking and securities, healthcare providers, and insurance.

Typical Customer Size: In line with its parent company's philosophy, EdgeVerve targets the needs of major corporations.

Kofax

Product or Portfolio Overview

Kofax is based in Irvine, California, with over 1,400 employees, including approximately 650 dedicated to RPA. A long-standing business process management (BPM) provider founded in 1985, Kofax has reinvented itself several times to remain a relevant leader in today's enterprise software automation market. It has a large established base of client relationships and an extensive partner ecosystem. Kofax's OCR/document processing technology is a key relevant capability. With existing offerings such as the Kofax TotalAgility (KTA) BPM platform, as well as machine learning and analysis tools, Kofax is well-positioned to deliver on the promise of end-to-end automation.

How Kofax Competes

Strategic Direction: The large number of customers for its image capture products provides a major market opportunity for the introduction of Kofax RPA. Kofax RPA leverages a rich legacy in document and image capture, as well as delivering native OCR capabilities. For many customers, it is less expensive to buy a bundled Kofax RPA and OCR solution than an alternative RPA product that then requires separate OCR licensing. Kofax also has developed strong internal capabilities around helping customers establish RPA centers of excellence (COEs) to implement Kofax RPA tooling. This foothold provides a solid basis for growth and expansion.

Claimed Differentiation: One key strength of Kofax lies in its integration capabilities instrumental to broader intelligent automation (cognitive capture, process orchestration, advanced analytics and mobile engagement). Kofax RPA also supports integration standards such as Web Services, REST, XML and database standards. Other areas of differentiation include advanced AI capabilities (natural language processing, entity extraction, sentiment analysis, machine learning and computer vision), enterprise automation scalability, and digital workforce management and governance.

Geography: Kofax clients are largely located in North America.

Industry Verticals: Kofax's key industries include financial services and insurance, transportation and logistics, and manufacturing.

Typical Customer Size: Large organizations are typical Kofax customers.

NICE

Product or Portfolio Overview

Based in Israel with a total workforce of 6,800, NICE has approximately 300 employees dedicated to RPA. NICE is a software portfolio company primarily focused on solutions for perfecting

customer experiences through workforce engagement management (WEM) solutions for customer service applications, case management and employee engagement. The NICE Advanced Process Automation suite includes NICE Employee Virtual Attendant (NEVA), NICE Desktop Analytics and, crucially, NICE Robotic Process Automation.

NEVA is NICE's attended automation solution. NEVA delivers process/task discovery, desktop automation, next-best-action guidance and predictive analytics. From an AI perspective, NICE has several built-in capabilities, including real-time speech guidance, NLP-based text analytics and unsupervised machine learning, as well as a cognitive framework for integrations into third-party AI solutions.

How NICE Competes

Strategic Direction: NICE Advanced Process Automation includes specialized attended bots to augment its workforce management functionality across a range of vertical industries, including finance, banking, telecom and manufacturing. NICE has a broad and robust connectivity offering leveraging two leading approaches. These are Object-based Connectivity (a proprietary NICE innovation, which became the industry standard) and Surface connectivity (now with a NICE patented Shape Analysis innovation that uses computer vision to cover close to 100% of connectivity requirements).

Claimed Differentiation: NICE focuses its differentiation on combining state-of-the art RPA with leading attended robotic desktop automation (RDA – key for contact center and back-office operations) and AI-led innovation centered around its automation discovery tool integrated into the Automation Portal. Also, NICE RPA is integrated into NICE's wider portfolio of solutions. These include BPM, Back Office Suite, and Nexidia text and voice analytics, to name a few. Plus, NICE has the capability to fulfill large-scale automation projects (with up to 32,000 robots deployed in a single customer). Having \$1.5 billion in revenue and 6,800 employees and being a portfolio company also act as a differentiator, making NICE a viable "one-stop shop" for multiple contact center/back-office initiatives.

Geography: NICE leverages its strong global footprint, with direct support in over 35 countries. Its major markets are in North America and Western Europe, mostly the U.S., Canada, the U.K., Germany and France, with noticeable presence also in Australia and India.

Industry Verticals: NICE's major industries served include financial services (banking and securities and insurance), followed at a distance by communications, government and healthcare.

Typical Customer Size: NICE's go-to-market strategy targets large-enterprise customers – organizations with more than 1,000 employees and more than \$1 billion in revenue (with a particular focus on companies with between 2,500 and 10,000 employees).

Pegasystems

Product or Portfolio Overview

Established in 1983 in Massachusetts, and currently with 5,100 employees (it does not break out the number dedicated to RPA), Pegasystems is a well-established software vendor with deep-rooted expertise. As an established player in the iBPMS, multiexperience development platform (MXDP) and low-code application platform (LCAP) markets and a solid presence in CRM, Pegasystems has a relatively large customer base to accelerate the adoption of its RPA product: Pega Robotic Automation. Pegasystems' strategy is to position RPA as a stepping stone to hyperautomation. This seems to resonate well with customers who are looking to achieve end-to-end automation focused on digital transformation, rather than optimization.

How Pegasystems Competes

Strategic Direction: Pegasystems offers a stand-alone RPA option for task automation, as well as unified RPA within its Pega Infinity platform for longer-running process choreography, AI and business rule capabilities. Pegasystems' product focus for RPA is on the higher ROI of attended RPA but also supports unattended RPA. Although Pegasystems supports RPA-based data integration, it encourages evolving and retiring RPA integrations with API-based data integration to better support long-running process support. The strength of the Pegasystems robotics platform lies in its ability to help optimization buyers begin a path to hyperautomation using longer-running processes, augmented analytics, and native machine learning and AI capabilities.

Claimed Differentiation: Pegasystems stresses the stability, scalability and long running of its attended bots, which are said to be easier and safer to change (abstracted from myriad screen changes that affect most unattended bots in the marketplace). Also, the company highlights the ability of Pega Robotic Automation to handle complex business rules and decisioning and its potential when associated with event-driven end-to-end automation.

Geography: Pegasystems has global reach, with worldwide offices and a well-structured ecosystem to spread its brand, technologies and practices. These ecosystem programs include a broad array of implementation partners with strong business and vertical industry capabilities.

Industry Verticals: Pegasystems plays in all industries but the largest traction for its RPA products is in financial services. Almost half its revenue is generated by banking and securities and insurance, followed by communications, media and services generating around one-third.

Typical Customer Size: Typical customers for Pegasystems are very large enterprises with more than 10,000 employees.

UiPath

Product or Portfolio Overview

Founded in 2015 in Romania, UiPath is a privately owned RPA pure player now headquartered in New York City that can count on 2,965 employees distributed worldwide. The company, with its UiPath version 2020.4 and UiPath Connect platform, has penetrated a wide variety of industries and has representation in 45 countries, with physical offices in 23. UiPath's RPA platform provides

an intuitive user experience across a range of RPA personas, including business users, citizen developers and seasoned IT developers.

How UiPath Competes

Strategic Direction: UiPath's well-structured partner ecosystem includes 296 technology partners that offer complementary technology and tools. This enables it to support integrations with major products and applications covering BPM, process mining and AI. UiPath also looks to drive customer success by encouraging users to collaborate and solve problems through its UiPath Academy, its Community Forum and Slack Community channel. Across these engagement mechanisms, 62,000 active users have developed more than 850 reusable components. The AI-led R&D approach justifies UiPath's investments in development centers in India, Romania and the U.S.

Claimed Differentiation: UiPath cites strong integration features, security and resilience capabilities. Scalability is also quoted as a strength (UiPath's Community edition is running 20,000 tenants and 40,000 robots on a single instance of Orchestrator), alongside the claim of rapid results in terms of implementation and time to value. The company also boosts its credentials of open innovation with technology and implementation partners democratizing RPA alongside a community of now over 750,000 people.

Geography: UiPath's traction is distributed across regions, with around one-third of revenue coming from North America, closely followed by Western Europe and Japan/Asia. Key countries are the U.S., the U.K., Japan and France.

Industry Verticals: The financial services industry (FSI) represents around a quarter of customer revenue, closely followed by communications, media and services. Noticeable is also healthcare.

Typical Customer Size: Typical customers are large enterprises with more than 1,000 employees. UiPath has a noticeable presence among companies with more than 10,000 employees.

WorkFusion

Product or Portfolio Overview

WorkFusion was established in 2012 in New York City and has around 350 employees. Its Intelligent Automation solutions are powered by pretrained bots, proprietary AI technology and advanced analytics, working together to automate a wide range of business processes. The flagship product is WorkFusion Intelligent Automation, which incorporates RPA Express and enterprise-focused Smart Process Automation. The vendor offers clear and simple pricing information, with different rates for tooling that incorporate integrated machine learning versus straightforward RPA.

How WorkFusion Competes

Strategic Direction: WorkFusion employs a sophisticated machine learning capability in support of RPA objectives. WorkFusion shows solid capabilities and vision with regard to how AI and machine

learning can be used in the context of RPA. An integrated BPM canvas allows developers to coordinate RPAs, with clear looping and machine learning elements. Analytics are strong, with the ability to drill down into individual cases and identify the causes of errors that are affecting machine learning and process execution.

Claimed Differentiation: WorkFusion offers out-of-the-box solutions for document-heavy areas within regulated industries, such as anti-money-laundering (AML), KYC, and claims processing in banking and financial services. These solutions offer an easy-to-use UX for knowledge workers to leverage WorkFusion's AI capabilities without the need for IT or data scientists. Other areas of differentiation include low-code automated machine learning with no need for large datasets and data science teams, and real-time learning bots to adapt to changes in data and real-time advanced analytics.

Geography: WorkFusion predominantly focuses on North America and Western Europe.

Industry Verticals: Around 60% of revenue is generated by clients in the FSI sector. Retail and healthcare follow at a distance.

Typical Customer Size: WorkFusion's customers are predominantly large organizations, with typically more than 5,000 employees.

References and Methodology

Gartner conducted primary research using a questionnaire. It surveyed 41 leading RPA service providers across all provider categories, backgrounds and types.

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[Product Managers Must Use Hyperautomation to Enhance Offerings](#)

[Competitive Landscape: Robotic Process Automation Service Providers](#)

[Forecast Analysis: Application Infrastructure and Middleware Software, Worldwide](#)

[Magic Quadrant for Robotic Process Automation Software](#)

[Move Beyond RPA to Deliver Hyperautomation](#)

[Comparing Digital Process Automation Technologies Including RPA, BPM and Low-Code](#)

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