

Intelligent Automation Tools 2020 RadarView™ – Report Excerpt

Intelligent Platforms Changing the Automation Landscape

October 2020

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- Enterprise software providers enter the AI-led automation marketplace to develop intelligent platforms
- Citizen development is on the rise with the availability of low-code, pre-built automation tools, and self-service capabilities
- Flexible, low-cost pricing options are accelerating the adoption of intelligent automation and enabling scale
- Tool vendors introduced specialized offerings, free automation solutions to support enterprises during pandemic

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- Tool vendors covered – Appian, Automation Anywhere, Automation Edge, Blue Prism, EdgeVerve, Jacada, Kofax, Kryon Systems, Microsoft, NICE, Pegasystems, UiPath, Verint, WorkFusion.





Executive Summary

Key intelligent automation tools trends shaping the market



Hyperautomation and platform-based approach is changing the automation landscape

- The RPA industry has shifted toward hyperautomation, which leverages AI, ML, and NLP to enable end-to-end automation. Tool vendors have also evolved their solutions into enterprise-class suites covering the entire automation lifecycle by bundling process discovery, workflow orchestration, prediction and recommendation, document processing, analytics, and unified dashboards.
- Software vendors such as SAP, Microsoft, IBM, and Oracle have also entered the AI-led automation marketplace by embedding automation in their applications and platforms organically or inorganically.

Low-code platforms and self-service capabilities are driving citizen development and platform maturity

- Automation platforms are morphing into low-code platforms enabling point-and-click implementations. The emergence of private bot stores and an increasing number of marketplaces for pre-built bots, connectors, templates, workflows, scripts, and AI skills are further fueling citizen development.
- Emerging self-service capabilities such as self-healing, self-scaling, self-installation, and self-learned workflows will become more mainstream and enable ease of platform implementation.

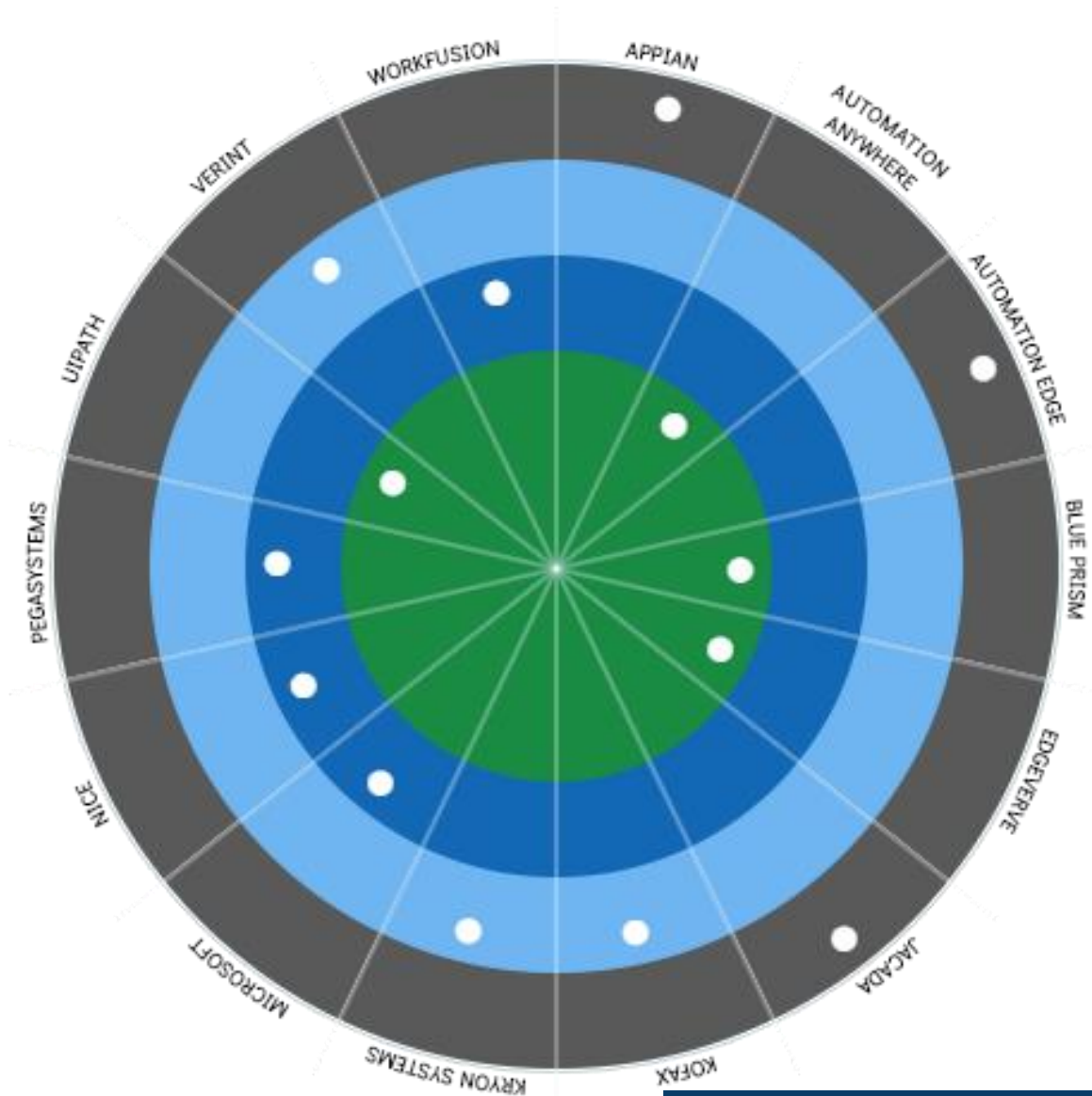
Flexible pricing options, TCO reduction, and lower entry point is accelerating scalability and flexibility

- Flexible pricing options such as per-process/bot and outcome-based costing have been in vogue since the inception of RPA. Tool vendors are now increasing focus on reducing the TCO and reducing barriers to entry and scaling. Increased partnerships with software vendors and platforms such as MS Azure, Google, AWS are enabling solution bundling.
- SaaS models, BYOL, and unlimited automation packages are further impacting the pricing dynamics and accelerating scalability.

Intelligent automation emerges as a digital vaccine by enabling business continuity during pandemic

- To help enterprises meet the surge in customer demand and interactions, tool vendors are offering free bots, specialized solutions like PPA bots, free RPA training programs, and conducting hackathons to identify new application areas.
- Use of “attended automation” in a remote environment can enable contact center agents to work from home and ensure service consistency, compliance, productivity, and employee engagement.

Avasant recognizes 14 top-tier vendors supporting the enterprise adoption of Intelligent Automation



LEADERS

Automation Anywhere Blue Prism
EdgeVerve UiPath

INNOVATORS

Microsoft NICE
Pegasystems WorkFusion

DISRUPTORS

Kofax Kryon Systems
Verint

CHALLENGERS

Appian Automation Edge
Jacada



Enterprise software providers enter the AI-led automation marketplace to develop intelligent platforms

Software providers are embedding RPA, prediction, and recommendation in their applications and platforms through acquisitions or investments

Key RPA Acquisitions



Key RPA Investments

-  In October 2020, Oracle announced enhanced ML capabilities to its customer data platform, CX Unity, for predictions and insights. The platform will now support real-time behavioral data collection and personalization capabilities through Infinity, Oracle's digital streaming technology.
-  In May 2020, Plex Systems announced the addition of RPA to its Smart Manufacturing Platform to bring in hyperautomation capabilities in partnership with Thirdware.

Citizen development is on the rise with the availability of low-code, pre-built automation tools, and self-service capabilities



Low-code automation platforms

Appian

- Appian offers a full-stack of automation; combining AI, RPA, decision rules, document processing, and workflow orchestration on a low-code platform.



- Pega offers a unified low-code automation platform. In February 2020 it launched Pega Express, a low-code software development methodology.



Private bot store and marketplace for pre-built solutions



- Blue Prism and Automation Anywhere launched private bot stores in 2020 to scale automation projects. It offers a centralized and cloud-based marketplace within the organization.



- An increasing number of online marketplaces for pre-built bots, connectors, templates, workflows, scripts, and AI skills are fueling citizen development.



Self-service capabilities



- Using patented deep robotics technology, in July 2020 Pega launched its self-healing RPA capabilities, Pega X-ray Vision. It detects and fixes broken bots without human intervention.



- Kryon Systems offers a self-service automation platform with bot healing, scaling, and installation capabilities.

Flexible, low-cost pricing options are accelerating the adoption of intelligent automation and enabling scale



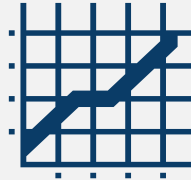
SaaS-based delivery models



- Automation Anywhere offers Cloud Starter Packs (SaaS solutions) starting at 750 USD per month to help organizations reduce infrastructure costs for automation engagements.



- With the acquisition of Thoughtonomy in 2019, Blue Prism launched various hybrid and SaaS deployment capabilities as part of Blue Prism Cloud.



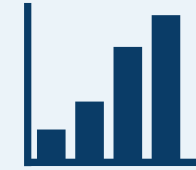
Unlimited RPA pricing model



- Appian offers unlimited bots on its low-code platform at 5,000 USD per month. It also includes built-in AI from Google, CoE development, BPM, analytics and reporting, and document management.



- HelpSystems offers an enterprise license at 90,000 USD per year which provides unlimited access to bots, APIs, workflows, pre-built cognitive actions, and developer studios.



Low-cost entry points and lower TCO



- Microsoft offers attended RPA per individual user at 40 USD per month. It allows users to create unlimited workflows and automate legacy applications using RPA and AI.



- WorkFusion reduced its platform TCO by 25% and offers an annual subscription to its automation cloud platform at a starting price of 50,000 USD.

Note: This is not an exhaustive list of tool vendors
Sources: Avasant Research, Avasant Intelligent Automation Tools RadarView Survey, July 2020 – August 2020

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