

The Forrester Wave™: Robotic Process Automation, Q1 2021

The 14 Providers That Matter Most And How They Stack Up

by Bernhard Schaffrik

March 15, 2021

Why Read This Report

In our 25-criterion evaluation of robotic process automation (RPA) providers, we identified the 14 most significant ones — Automation Anywhere, Blue Prism, Cyclone Robotics, Datamatics, EdgeVerve, Hyland, Kofax, Kryon, Microsoft, NICE, Pegasystems, SAP, UiPath, and WorkFusion — and researched, analyzed, and scored them. This report shows how each provider measures up and helps enterprise architects select the right one for their needs.

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Enablers For Scaling And Scope Extensions Matter Most

To secure and leverage RPA investments, customers want to scale existing bot environments and extend the scope of their automation projects beyond classic desktop-based tasks to more complex processes. Particularly in times of broken manual processes that require digitization and automation to run smoothly while everyone is working from home, RPA software must be scalable and therefore suitable and appealing to business users to get damaged processes back into operations rapidly. Vendors are responding to these needs with integrated task and process mining capabilities, advanced ROI and portfolio analyses, AI-infused content analytics and processing, RPA-platformwide features addressing business users, and flexible pricing models.

As a result of these trends, RPA customers should look for providers that:

- **Deliver broad and rich experiences for business leaders.** As business experts and business process owners tap into automation, RPA software must serve this user group as deeply as it does professional developers. Identification and prioritization of automation candidates using mining and analytics features is equally important, as are easy-to-use bot design, deployment, and management functionalities. Bot stores are a great enhancement to accelerate automation adoption while supporting adherence to a company's automation governance framework.
- **Integrate RPA-adjacent automation technologies.** Forrester has been observing the ongoing convergence in the automation software sector in recent years. Leading RPA vendors influence the evolution of the automation software market by either acquiring or building automation technologies that augment their RPA pure-play solutions. A few examples include automation of operations processes that require connecting to IoT ecosystems, AI-infused decisioning tools that automate processes in the banking and insurance industry, and digital assistants that offer an additional channel to the RPA platform.
- **Empower a superior scaling experience.** Free trials, as well as pay-as-you-consume and pay-by-ROI models, lower RPA entry barriers for beginners. Both RPA beginners and advanced customers

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benefit from a variety of architecture and hosting options, from fully on-premises to cloud-native software as a service (SaaS).

Evaluation Summary

The Forrester Wave™ evaluation highlights Leaders, Strong Performers, Contenders, and Challengers. It's an assessment of the top vendors in the market and doesn't represent the entire vendor landscape. You'll find more information about this market in our reports on intelligent automation, including ["Intelligent Automation Will Push Organizations Flat, Wide, And Anxious."](#)

We intend this evaluation to be a starting point only and encourage clients to view product evaluations and adapt criteria weightings using the Excel-based vendor comparison tool (see Figure 1 and see Figure 2). Click the link at the beginning of this report on Forrester.com to download the tool.

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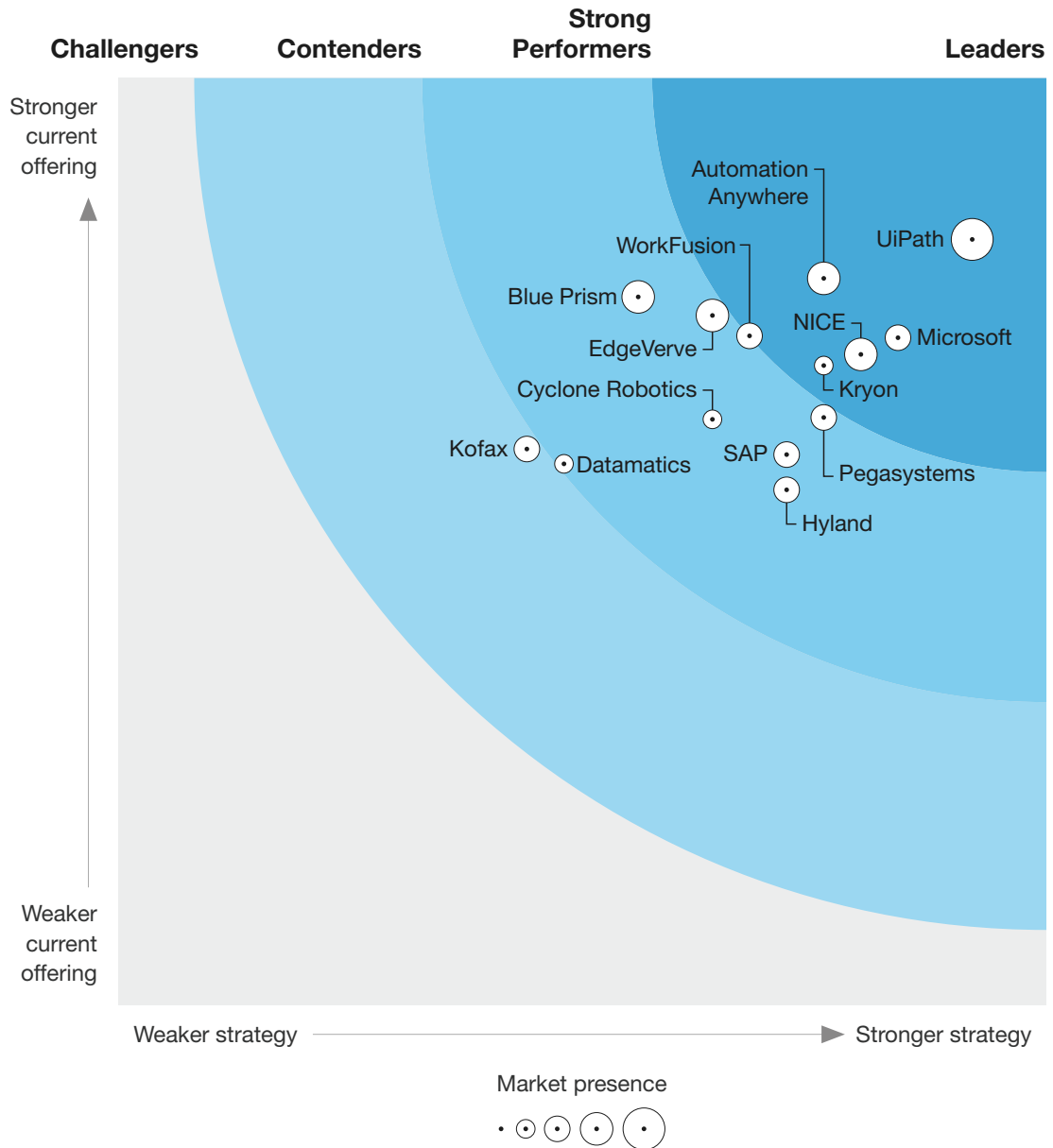
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FIGURE 1 Forrester Wave™: Robotic Process Automation, Q1 2021

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Robotic Process Automation

Q1 2021



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FIGURE 2 Forrester Wave™: Robotic Process Automation Scorecard, Q1 2021

		Forrester's weighting	Automation Anywhere	Blue Prism	Cyclone Robotics	Datamatics	EdgeVerve	Hyland	Kofax
Current offering		50%	3.92	3.82	3.16	2.92	3.72	2.78	3.00
Discovery, bot ideation, portfolio, and ROI	10%	3.00	5.00	2.00	1.50	4.50	3.50	1.50	
Bot design and development	25%	5.00	3.00	3.50	2.40	3.50	2.10	3.50	
Bot deployment, management, and analytics	25%	3.00	3.00	4.40	3.00	3.00	2.40	3.00	
Bot governance, platform model, and security	25%	4.20	5.00	2.60	3.40	3.80	3.40	2.60	
General platform capabilities	15%	3.80	3.80	2.20	3.80	4.60	3.00	3.80	
Strategy		50%	3.80	2.80	3.20	2.40	3.20	3.60	2.20
Product vision	20%	5.00	1.00	5.00	3.00	3.00	5.00	3.00	
Performance	10%	5.00	3.00	3.00	3.00	5.00	5.00	3.00	
Innovation roadmap	20%	3.00	3.00	3.00	1.00	3.00	3.00	3.00	
Supporting products and services	20%	3.00	3.00	3.00	3.00	3.00	3.00	1.00	
Partner ecosystem	10%	5.00	5.00	1.00	1.00	3.00	3.00	3.00	
Delivery model	20%	3.00	3.00	3.00	3.00	3.00	3.00	1.00	
Market presence		0%	4.00	3.75	2.00	1.25	3.50	2.50	3.00
Enterprise RPA customers	25%	5.00	4.00	2.00	1.00	3.00	4.00	3.00	
Enterprise customers	25%	3.00	3.00	2.00	2.00	5.00	4.00	3.00	
Product revenue	50%	4.00	4.00	2.00	1.00	3.00	1.00	3.00	

All scores are based on a scale of 0 (weak) to 5 (strong).

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FIGURE 2 Forrester Wave™: Robotic Process Automation Scorecard, Q1 2021 (Cont.)

	Forrester's weighting	Kryon	Microsoft	NICE	Pegasystems	SAP	UiPath	WorkFusion
Current offering	50%	3.45	3.60	3.51	3.17	2.97	4.13	3.61
Discovery, bot ideation, portfolio, and ROI	10%	4.00	2.50	3.00	5.00	1.00	3.50	3.00
Bot design and development	25%	3.90	4.40	4.10	2.40	3.50	4.40	3.80
Bot deployment, management, and analytics	25%	2.60	3.00	2.40	2.60	3.00	4.00	2.40
Bot governance, platform model, and security	25%	3.40	4.20	3.80	3.40	3.40	4.20	5.00
General platform capabilities	15%	3.80	3.00	4.20	3.80	2.60	4.20	3.40
Strategy	50%	3.80	4.20	4.00	3.80	3.60	4.60	3.40
Product vision	20%	5.00	5.00	5.00	5.00	3.00	5.00	5.00
Performance	10%	3.00	5.00	5.00	3.00	5.00	5.00	3.00
Innovation roadmap	20%	3.00	3.00	5.00	3.00	3.00	3.00	3.00
Supporting products and services	20%	3.00	3.00	3.00	5.00	3.00	5.00	3.00
Partner ecosystem	10%	3.00	5.00	3.00	3.00	3.00	5.00	3.00
Delivery model	20%	5.00	5.00	3.00	3.00	5.00	5.00	3.00
Market presence	0%	1.50	2.75	3.50	2.25	2.25	5.00	3.00
Enterprise RPA customers	25%	1.00	4.00	3.00	2.00	3.00	5.00	1.00
Enterprise customers	25%	3.00	3.00	5.00	3.00	2.00	5.00	5.00
Product revenue	50%	1.00	2.00	3.00	2.00	2.00	5.00	3.00

All scores are based on a scale of 0 (weak) to 5 (strong).

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Vendor Offerings

Forrester included 14 vendors in this assessment: Automation Anywhere, Blue Prism, Cyclone Robotics, Datamatics, EdgeVerve, Hyland, Kofax, Kryon, Microsoft, NICE, Pegasystems, SAP, UiPath, and WorkFusion (see Figure 3).

FIGURE 3 Evaluated Vendors And Product Information

Vendor	Product evaluated	Product version evaluated
Automation Anywhere	Automation Anywhere Enterprise	Automation 360 (formerly A2019)
Blue Prism	Blue Prism	6.10 (product family)
Cyclone Robotics	Cyclone RPA Suite; Cyclone Mobile Suite; Cyclone Platform Suite	2.3; 1.0; 1.0
Datamatics	TruBot	4.6.0
EdgeVerve	AssistEdge	18.1
Hyland	Hyland RPA	1.27.6
Kofax	Kofax RPA	11.1
Kryon	Kryon Full-Cycle Automation	Version 20.10
Microsoft	Power Automate	GA
NICE	NICE Robotic Automation	7.3
Pegasystems	Pega Infinity	8.5
SAP	SAP Intelligent Robotic Process Automation	2.0
UiPath	UiPath Automation Platform	2020.10
WorkFusion	Intelligent Automation Cloud	10.2

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Vendor Profiles

Our analysis uncovered the following strengths and weaknesses of individual vendors.

Leaders

- **UiPath continues market expansion around the globe.** This RPA Leader has invested heavily in expanding its range of products to maximize the value that automation brings its customers. UiPath launched Automation Cloud, which oversees a hybrid cloud of both public cloud and on-premises infrastructure; with Automation Hub, it launched a platform for automation centers of excellence (COEs). In 2020, UiPath switched its licensing model to persona-based, bundling all the products that various automation users need into a single offering. In addition, it initiated several flexible “all you can eat” offerings designed to offer enterprises the benefits of scaling early on.

Task mining isn't yet part of Automation Hub, but process mining features, collaborative discovery, assessment tools, and graphical visualizations provide all you need to analyze and track automation ROI and its realization. StudioX requires no programming skills, while Studio targets advanced developers. The UiPath Marketplace, shared with Microsoft, Salesforce, Workday, and others, includes more than 1,000 reusable components. Embedded AI functionalities classify and extract data from unstructured, semistructured, and structured documents and reliably scan at high speed. Bot-triggering capabilities are limited, with workarounds. Security, access control, and authentication features are state-of-the-art. The open platform integrates easily with enterprise applications like Google Workplace, Microsoft Office, Oracle, Salesforce, ServiceNow, and Workday; UiPath builds and supports native integrations along with technology partners. UiPath offers an enterprise-grade and innovative RPA solution augmented by a large ecosystem of partners, making it a good fit for large, global enterprises with demanding needs for support and governance.

- **Microsoft has caught up with the Leaders.** The software giant's vision is to deliver the most comprehensive SaaS-based intelligent automation solution; Power Automate is a cloud-native, low-code automation platform that brings together UI- and API-based automation with AI. Microsoft acquired Softomotive in May 2020 to accelerate execution of this strategy. A rich set of training and learning resources and community programs, complemented by a broad global partner ecosystem, helps customers succeed at every stage. Microsoft focuses on democratizing RPA by making it accessible to users with a very low entry barrier. Users can start instantly, at no cost, and can deploy their first automation in minutes.

Process discovery, automation ideation, ROI calculation, and portfolio management features are rudimentary. This doesn't really matter right away to users starting in the Power Automate design environment. The design experience is rich, yet intuitive, and will please citizen and professional developers alike. Compared with earlier versions, significantly more environments, such as AS/400, Citrix, and a broader set of browsers, are accessible for the designer. AI Builder offers prebuilt and

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customizable AI models for ingesting and processing structured and unstructured content. These models are included with the SaaS license. Bot deployment and management capabilities are too technical for citizen developers, however. Security and governance needs are covered by the overarching Microsoft 365 Audit and Compliance Center, which is part of Azure Active Directory. The licensing structure for Power Automate is simple, but customers frequently mention confusing messages from Microsoft sales reps around licensing and pricing. Microsoft customers seeking RPA get an easy, attractive offering that fits business users, citizen developers and professional developers alike.

- **Automation Anywhere drives human-bot collaboration.** This RPA stalwart completely rebuilt its product to turn it into a cloud-native, web-based, AI-infused platform, with capabilities from discovery to automation delivered via an integrated and seamless experience. Its roadmap embraces innovations to further democratize RPA for business. Automation Anywhere sells and delivers through more than 2,100 partners in 90-plus countries. More than 130 technology alliances include Amazon Web Services (AWS), BMC, Citrix, Google, IBM, Microsoft, MuleSoft, Oracle, Salesforce, and SAP.

Users can generate simple bots in near-complete form through the universal recorder. Business developers build with easy-to-use tools and can resort to Automation Anywhere's own bot store as well as third-party stores. IQ Bot is well received for targeted document extraction use cases and uses a combination of machine learning (ML) and data processing techniques. A2019 (now renamed Automation 360) has made strides in openness; IQ Bot, for example, can leverage natural language processing (NLP) as well as text analytics from AWS, Google, IBM, Microsoft, and other alliance partners. With Bot Insight, users define their own views from audit trail and operations data. AARI, a digital assistant, complements the full automation lifecycle. Customers would like greater ease of use and easier exporting to third-party reporting tools. The RPA platform has a comprehensive set of governance, security, and compliance features that make it ready to use, even in highly regulated industries. It makes for difficult migrations of complex bots built with former releases, but it's an improved platform and positions Automation Anywhere well for a growing cloud RPA market.

- **NICE focuses on voice- and text-analytics-related use cases.** With Process Automation Platform, NICE delivers a solution dedicated but not limited to contact center automation. New AI-based features include real-time speech analytics, real-time inventory checks, and next-best-offer recommendations for contact center agents. While NICE continues to innovate by leveraging the latest AI breakthroughs, it's also serious about AI ethics. As an example, every customer must acknowledge its robotics ethical framework. NICE currently has more than 700 customers.

NICE Automation Finder collects and analyzes employee desktop data, suggests automations, and helps generate automations using Click to Automate. Screen and object controls have improved over previous releases — the solution offers a great variety of OS, platform, and application connectors. Text analytics and voice-driven automation have contact-center features for content

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ingestion, classification, and processing. To improve automations, bot management features strong visualization, with an ability to measure the quality of bots built by different developers. However, bot-testing capabilities for unattended automation are limited. Reference customers state that root-cause analysis of bot failures is cumbersome, but they might see improvements with the latest version of the product. Security, access control, and authentication functionalities are on par with those of other Leaders and are appropriate for highly regulated industries. This vendor's platform and license structure allow convenient scaling. NICE is a good fit not only for contact center automation but for both attended and unattended use cases, with a focus on text/voice analytics and processing.

- **Kryon leads with business process discovery.** The vision of this company is all about accelerating time-to-production from weeks and months to a few days. To do so, it has invested heavily in enablers such as increased bot resilience and automation analytics. It approaches the market with Full-Cycle Automation, which spans task and process mining, process discovery, automation, and continuous automation improvement. To further scale its offering, it designed a way to embed its automation solution into partner platforms, including Software AG and Verint.

Kryon Process Discovery leverages AI for mining and generates visualizations, allowing businesspeople to identify the best automation fits; it can even be used for training purposes, suggesting the best path for a user to complete a process. Its design environment, Kryon Studio, is a good experience for business users, citizen developers, and experienced developers alike. It allows the user to start either from process discovery or by jumping right into the design canvas. To minimize bot failures and maintenance effort, customers can easily define fallbacks and error-handling procedures. However, reference customers mention that high resilience comes with a slightly low bot performance. Kryon relies on robust integrations with ABBYY, Microsoft Cognitive Services, and others for text analytics and processing. Customers appreciate high engagement levels and support quality across geographies and company sizes. Kryon is a great fit for companies seeking a solution that tackles RPA from a business process optimization angle combined with a focus on businesspeople and citizen developers building and running the bots.

- **WorkFusion targets banks and insurance companies.** This RPA specialist targets its RPA solution to banks and insurance companies. Its partners reflect the focus on the financial industry, with more complex and data-driven use cases. Strategically, it intends to grow in EMEA and APAC and now includes healthcare as an additional focus.

Intelligent Automation Cloud lacks task mining, which is less of a requirement for its targeted clients. Instead, discovery capabilities evaluate broader work patterns, leading to process improvements. WorkFusion differentiates itself by accessing and linking objects in applications from Bloomberg, Fircosoft, LexisNexis, Oracle, Reuters, SAP, and others. More than 100 prepackaged bots are available for reuse, including connectors, reference data, and ML models. Their learning capability enables bots trained in one customer's environment to be stripped of sensitive components, using differential privacy, and made available to other customers. Document

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processing is a strength. WorkFusion excels at governance through auditability and transparency into bot performance. Bank-grade security features handle sensitive and regulated data. Metrics such as explainability and sensitivity analysis help pass risk-management requirements for banks. Overall, core automation deficits in areas like attended automation, testing capabilities for unattended automation, and reliance on a direct integration model make for a more specialized automation capability. This product is a strong choice for banks and insurance companies as well as other firms that align with its prepackaged components.

Strong Performers

- **Pegasystems goes far beyond RPA for automation.** With Infinity, Pegasystems offers an intelligent automation platform that unifies RPA, digital process automation, document processing, low-code development, and task mining. In the past year, the company has made significant strides in addressing trends, most notably in competitive recording features for citizen developers to simply record processes and with X-ray Vision to radically simplify creation and maintenance of highly resilient attended automations. As skill development and training is one of Pegasystems' strategic investment pillars, it has initiated countless university collaboration programs and takes pride in its 300,000-strong global user community. Pega Infinity comes with a broad set of free hands-on tutorials and webinars, additionally offering extensive modular trainings.

Infinity's X-ray Vision mines user tasks and identifies automation candidates. A set of tools and workflows enables collaboration, prioritization, and approval of automation candidates. Task- and process-related automation benefits are visualized clearly and are easily digestible, suggesting that business process experts pick the right candidates to further manage and following an agile project approach. Although the experience of the design environment has improved with the latest version, citizen developers will still find it hard to fully leverage all available features. Deploying, managing, and repairing automations is very convenient; scheduling and prioritization is even done automatically. It's notable that most Pegasystems customers stay with the company for many years, with the tool suite providing what they need as they broaden their automation scope.

- **EdgeVerve is attractive for firms seeking platform and consulting in one place.** AssistEdge is an end-to-end automation platform consisting of discovery, automation, and orchestration capabilities. As part of the Infosys combine, it focuses on the big Global 2000 companies; however, it's also attractive for small and midsize businesses through an extensive partner program. AssistEdge comes with specialized flavors for specific use cases, such as contact center automation, testing, or legal contract analysis. Given its experience with very large clients, AssistEdge comes with a useful set of tools that allow both convenient scaling and version updates and data migration.

The built-in task-mining capability is state-of-the-art and can be augmented by process mining that comes from EdgeVerve's partner MinIt. Discovered automation candidates are seamlessly transferred to the design environment; bot design and deployment capabilities provide a rich and

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holistic experience. However, this feature is for professional developers rather than people without a developer background. Bot governance and runtime features are sophisticated and fit a large enterprise's variety of governance and auditing demands. Root-cause analysis of bot failures as well as bot repair and maintenance capabilities require some rework by EdgeVerve to make them more efficient and convenient. EdgeVerve's solution is very attractive for large companies looking for a platform that integrates RPA, discovery, and low-code development capabilities. To speed up implementation time, resort to Infosys' own consulting services.

- **Blue Prism offers stable, compliant, and secure RPA.** Having been at the forefront of the RPA industry for 15 years, Blue Prism is now looking beyond RPA to better serve enterprises in the broader intelligent automation space. Its R&D investments more than doubled in 2020 and will continue to grow next year to realize this promise. As a global RPA provider, Blue Prism manages a strong ecosystem of go-to-market alliances and implementation partners in most countries. Its licensing follows an all-in-one model.

Blue Prism provides Automation Lifecycle Management as an overarching suite of tools to assist with stages from automation ideation to deployment and continuous improvement. This includes its Process Assessment Tool for collaborative automation selection, which integrates with ABBYY Timeline, Celonis, FortresIQ, Signavio, and others. The bot-building process is citizen-developer-friendly, with intuitive navigation and more than 1,800 prebuilt automations downloadable from Blue Prism's Digital Exchange for reuse. A low-code development capability augments the bot design for attended automations. Decipher IDP supports the classification and extraction of data from structured and semistructured documents, using a combination of rules-based, optical character recognition (OCR)-based, and ML-based techniques. Blue Prism conforms to a broad set of compliance standards, including the Health Insurance Portability and Accountability Act (HIPAA), the Payment Card Industry Data Security Standard (PCI-DSS), and the Sarbanes-Oxley Act (SOX). For data security, strict role-based access control and tenants allow restriction of information to mitigate unauthorized visibility. Blue Prism has a strong foundation focused on unattended automation but supports attended automation in a secure manner as well.

- **SAP has evolved from a contender to a strong performer.** SAP Intelligent RPA is a core component of the end-to-end process-excellence suite running on SAP Business Technology Platform, providing integrations with SAP and non-SAP solutions. SAP Intelligent RPA leverages SAP Business Technology Platform's integration connectors and prebuilt content from SAP API Business Hub; SAP's RPA complements line-of-business and industry apps as well as the Business Technology Platform. SAP offers services and tools to support customers throughout the lifecycle, via both its own channels and its partner network. SAP Intelligent RPA is available as a free 12-month trial for anyone and, following that, a consumption-based pricing model. It can be bundled with other SAP applications.

Task mining, discovery, and portfolio features such as cost-benefit analyses and portfolio visualizations lag the field. However, with the acquisition of Signavio and its RISE with SAP

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announcement, SAP will address this domain strategically. It has improved the designer for business and professional developers, and its bot store contains more than 150 prebuilt automations. Document processing requires integration with SAP's AI Business Services or partners like Abbyy. SAP Conversational AI — SAP's own NLP platform — processes real-time conversations. Connectors to multiple platforms automatically replace UI interactions with API calls for better bot resilience. Real-time monitoring, debugging, and visual modeling minimize the effort of bot error detection and repairs; SAP Intelligent RPA is available as SaaS on SAP Cloud Platform. SAP's RPA solution is a strong alternative for SAP customers, particularly for enterprises concerned with bots disrupting core SAP systems and those usually needing the central SAP development team to design, develop, and maintain RPA for clear accountability, or for companies seeking a feature-rich RPA tool that comes with a broad ecosystem of partners.

- **Hyland's automation platform offers RPA, orchestration, and low-code.** Hyland, named a Leader in "The Forrester Wave™: ECM Content Platforms, Q3 2019," added RPA to its existing intelligent automation product portfolio through the acquisition of Another Monday in 2020. It did a solid job integrating its capabilities into the Hyland ecosystem, with only a few features yet to be integrated — text analytics, as an example. Hyland specializes in building tailored automation solutions for a variety of industries, including healthcare, insurance, and financial services. Automation solutions comprise RPA, process orchestration, low-code capabilities, and integration with line-of-business systems.

Hyland provides process mining but, as of today, no task mining. A role-based idea management portal helps present and evaluate automation potentials with built-in approval and review steps, along with tools supporting the automation implementation as a project. Bot testing and deployment functionalities are very sophisticated; bot management and repair features are built for professional developers but are too technical for citizen developers. A business-user-friendly monitoring dashboard and graphical root-cause analyses are missing. Reference customers consistently appreciate the company's customer-centric culture, along with best-in-class support and services. Customers repeatedly mention the flexible licensing structure that allows convenient scaling. The product will soon be available as SaaS.

- **Cyclone Robotics enters the RPA market with fresh and innovative ideas.** This China-based player is new to the RPA and automation market. Founded in 2015, the vendor reports growing 400%, on average, for the past three years. With about 380 customers across APAC and EMEA, its approach to RPA is innovative. As an example, it extends applicability of its bots to the manufacturing operations space, blurring the lines between physical and virtual robots. Cyclone Robotics started to build a partner network in 2019 with about 150 partners, including AKKA, BearingPoint, H3C, and Lenovo. As it grows its business, it plans to use more third-party vendors to scale supporting services.

Task and process mining aren't yet available, but task recordings can feed the built-in automation portfolio analysis and ROI calculation. All bot lifecycle stages use a collaborative and stage-based

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process, allowing role-based configuration. Bot governance features are customizable. Design tools allow business and professional developers to build bots with low-code features extending to mobile devices; users can drag and drop AI components to process complex documents and email. RPA and third-party systems can invoke and consume AI skills as reusable microservices. Cyclone Analytics digests bot status and performance data along with events and logs for long-term analytics such as anomaly detection. Various features, such as a watchdog bot that runs in the background and creates alerts upon application changes, ensure a high level of bot resilience. The solution is not yet available as SaaS, as Chinese customers prefer private deployment. RPA is advancing rapidly in China after a slow start, and Cyclone Robotics is well positioned for that growth. Expansion across APAC, EMEA, and the US — and a broader partner ecosystem — will move Cyclone Robotics up the leaderboard.

- **Datamatics provides a robust RPA core with elaborate governance features.** This publicly listed company in India has been operating for more than 45 years. It has strong account retention and client satisfaction and continues to invest in product development and increasing its geographical reach. Datamatics' TruBot was built for automating processes across the front office, mid-office, and back office, meeting a range of intelligent automation requirements, including ingestion of unstructured data in automation workflows. It offers service capabilities in industry- and function-specific processes to ensure the value of complex automation scenarios.

TruBot's built-in ROI calculator is tracking RPA program benefits at a business level, with operational dashboards supporting decision-making. These features are integrated into TruBot Cockpit, which also provides all features for bot control, scheduling, and management; TruBot Cockpit is accessible from mobile devices as well. TruBot comes with elaborate bot governance functions that are well documented and very granular and that allow users to modify them on their own. Citizen developers are enabled to leverage the full design suite as well as AI-infused data extraction and both unstructured and structured content processing capabilities. Bot deployment capabilities are sophisticated, requiring professional developers for use. Small and midsize enterprises will benefit from Datamatics' RPA solution from both a usability and a pricing point of view, as will large enterprises that focus on leveraging core RPA capabilities.

Contenders

- **Kofax excels at document-heavy process automation and orchestration.** Kofax targets its strategy toward helping companies achieve digital workflow transformation in customer engagement, operations, and finance and accounting workflows. Document capturing and processing as well as process orchestration are key capabilities of Kofax RPA, which embeds powerful NLP and ML foundations for automation of document-centric, high-volume business processes. Customers can orchestrate end-to-end business processes by connecting Kofax RPA to their own application landscape, including integrations with other RPA providers such as Automation Anywhere, Blue Prism, or UiPath. Kofax RPA excels at capturing and processing both

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structured and unstructured data sources like news, social media blogs, and customer reviews to initiate automations. Software partnerships with Celonis and FortresIQ offer discovery and analysis of automation opportunities by task and process mining.

The experience of designing, deploying, and running automations is solid for citizen developers and professional developers alike. Kofax's experience with scaling up automations to what it calls large-scale "virtual workforces" of tens of thousands of bots is flashing up in many of its product's features. Kofax RPA is not yet offered as a SaaS or platform-as-a-service (PaaS) deployment option. However, it supports multitenancy and cloud by using Docker-based capabilities on AWS and Microsoft Azure. Kofax RPA is a good choice for companies that intend to automate document-heavy processes or need to orchestrate processes that span a variety of IT systems connected by structured documents or unstructured content.

Evaluation Overview

We evaluated vendors against 25 criteria, which we grouped into three high-level categories:

- **Current offering.** Each vendor's position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering. Key criteria for these solutions include task and process discovery and portfolio analysis, bot design and development, deployment and management, security and governance, scaling experience, and architecture.
- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors' strategies. We evaluated product vision and innovation roadmap, delivery and support models, financial performance, and partner ecosystem.
- **Market presence.** Represented by the size of the markers on the graphic, our market presence scores reflect each vendor's number and dollar value of RPA customers as well as overall RPA product revenue.

Vendor Inclusion Criteria

Forrester included 14 vendors in the assessment: Automation Anywhere, Blue Prism, Cyclone Robotics, Datamatics, EdgeVerve, Hyland, Kofax, Kryon, Microsoft, NICE, Pegasystems, SAP, UiPath, and WorkFusion. Each of these vendors has:

- **A product orientation rather than a service orientation.** Each RPA vendor must actively market and promote an RPA software platform for the RPA market. The primary revenue source of the vendor must be its RPA software platform. This means that customers must be able to deploy RPA independently of the software provider.
- **RPA as primary business or singular focus.** Each vendor must demonstrate its focus on providing RPA functionality to its clients. During the Forrester Wave process, we asked each vendor

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to provide three customer references, representing a diversity of industries, company sizes, and geographies, that have had its RPA software in production for at least one year.

- **An RPA product with a strong breadth of RPA functionality.** A broad range of use cases for attended and unattended workloads alike and for at least four distinct industries (e.g., finance, healthcare, insurance, and travel) must be supported with RPA. Vendors must integrate and support these capabilities well and administer them through a cohesive platform.
- **Existing clients and either a direct sales presence or partners in at least two regions.** RPA regions are North America, EMEA, APAC, and Latin America.
- **At least \$10 million in total software revenue derived from RPA alone per fiscal year.** Each vendor met this requirement in the past fiscal year.
- **Generated strong customer interest.** Through Forrester inquiries, consulting engagements, media requests, and ongoing conversations with players in the market, we developed an understanding of the demand for the vendors and solutions to include in this evaluation.

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Supplemental Material

Online Resource

We publish all our Forrester Wave scores and weightings in an Excel file that provides detailed product evaluations and customizable rankings; download this tool by clicking the link at the beginning of this report on Forrester.com. We intend these scores and default weightings to serve only as a starting point and encourage readers to adapt the weightings to fit their individual needs.

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows [The Forrester Wave™ Methodology Guide](#) to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos/briefings, and customer reference surveys/interviews. We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the Forrester Wave publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by December 21, 2020, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with [The Forrester Wave™ and New Wave™ Vendor Review Policy](#), Forrester asks vendors to review our findings prior to publishing to check for accuracy. Vendors marked as nonparticipating vendors in the Forrester Wave graphic met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation. We score these vendors in accordance with [The Forrester Wave™ And The Forrester New Wave™ Nonparticipating And Incomplete Participation Vendor Policy](#) and publish their positioning along with those of the participating vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the [Integrity Policy](#) posted on our website.

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