Gartner.

Magic Quadrant pour l'automatisation des processus robotisés

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Par Arthur Villa , Saikat **Ray** et **2 autres**

L'automatisation robotisée des processus demeure un marché logiciel clé pour améliorer l'efficacité opérationnelle grâce à l'automatisation tactique. Ce Magic Quadrant évalue 13 fournisseurs de RPA d'entreprise pour vous aider à faire le meilleur choix pour les besoins d'automatisation des tâches de votre entreprise.

Hypothèse de planification stratégique

D'ici 2027, 60 % des fournisseurs RPA incluront des fonctionnalités « d'utilisation informatique » dans leurs plateformes d'automatisation pour augmenter les interactions de l'interface utilisateur.

Définition/Description du marché

Gartner définit l'automatisation robotisée des processus (RPA) comme un logiciel qui automatise les tâches des processus métier et informatiques à l'aide de scripts imitant l'interaction humaine avec l'interface utilisateur de l'application. La RPA permet d'enregistrer une tâche manuelle ou de la programmer dans un script logiciel, que les utilisateurs peuvent développer par programmation ou en utilisant les interfaces utilisateur low-code et no-code de la plateforme RPA. Ce script peut ensuite être déployé et exécuté dans différents environnements d'exécution. L'exécutable du script déployé est appelé bot ou robot.

La RPA est utilisée dans de nombreuses fonctions métier pour l'automatisation des tâches tactiques . Les utilisateurs métier et informatiques peuvent exploiter la RPA pour :

- **Déplacez des données vers ou depuis des systèmes applicatifs sans intervention humaine (automatisation sans surveillance).** Les scripts sont conçus pour reproduire les actions d'un humain interagissant avec des systèmes ou des documents qui ne disposent généralement pas d'API. L'objectif est d'automatiser et de mener à bien une tâche sans intervention humaine. Généralement, l'automatisation sans surveillance est déclenchée par un système et des robots exécutés sur un serveur.

- **Automatisez les tâches avec l'intervention humaine (automatisation assistée).** La RPA peut extraire des informations des systèmes, les façonner et les préparer pour une utilisation humaine au moment opportun. Généralement, l'automatisation assistée est déclenchée par un humain et des robots exécutés sur un appareil local.

Caractéristiques obligatoires

Les caractéristiques obligatoires pour ce marché incluent :

- Capture d'écran, avec au moins cinq des connecteurs d'interface utilisateur suivants : Selenium IDE , Microsoft Active Accessibility (MSAA), Microsoft UI Automation, Java Application Connector , SAP WinGUI, Windows GUI ou émulateurs mainframe

- Possibilité d'enregistrer une tâche et de la convertir en un script pouvant être déployé

- Prise en charge de l'automatisation avec et sans surveillance

- Capacité à orchestrer et à administrer les utilisateurs, les scripts et le runtime, y compris la configuration, la surveillance et la sécurité

- Prise en charge de plusieurs environnements d'exécution de bot, tels qu'un ordinateur de bureau, un serveur sur site, un cloud public ou privé et des machines virtuelles

Caractéristiques communes

Les caractéristiques communes de ce marché incluent :

- Prise en charge du développement de scripts avec des langages de programmation standard ou des représentations low-code spécifiques au fournisseur (y compris des interfaces graphiques pour le développement citoyen)

- Reconnaissance optique de caractères (OCR) native et/ou intégration avec un outil OCR tiers pour capturer des données semi-structurées ou non structurées

- Vision par ordinateur avec modèles de résilience d'interface utilisateur pilotés par l'IA/le langage machine (ML) pour suivre les modifications des éléments de l'interface utilisateur de l'application et mettre à jour un bot pour réagir en conséquence

- Automatisation API-first via des connecteurs, notamment HTTP/REST, SOAP et API ouvertes

- Une expérience utilisateur low-code pour les automatisations de bâtiments

- Développement de flux de travail intelligents intégrés et pilotés par l'IA, invites en langage naturel avec navigation guidée

- Capacité à aider un centre d'excellence en automatisation (COE) à gérer les opérations et à suivre et signaler les avantages

Quadrant magique

Figure 1 : Magic Quadrant pour l'automatisation des processus robotisés

Points forts et précautions du fournisseur

Appien

Appian est un Challenger dans ce Magic Quadrant. Son produit d'automatisation des processus robotisés, Appian RPA, fait partie de la plateforme Appian, qui comprend un environnement de développement RPA principal, Appian Designer Studio, et une orchestration RPA, disponibles sur site et dans le cloud.

Appian est présent à l'échelle mondiale . Ses principaux clients sont généralement de grandes entreprises du secteur public, des services financiers et des assurances.

La feuille de route RPA d'Appian comprend des améliorations de la création de robots RPA low-code à l'aide de la conception assistée par l'IA et une intégration plus approfondie de l'IA générative (GenAI) dans les flux de travail Appian RPA via Appian AI Skills.

Points forts

- **Tarification :** Trois niveaux de tarification offrent aux clients un choix adapté à leurs besoins. Un pack de produits simple par utilisateur inclut l'accès à un nombre limité de robots RPA et à d'autres fonctionnalités d'automatisation. Si des robots supplémentaires sont nécessaires, ils peuvent être achetés à un prix inférieur à celui de leurs concurrents. L'offre premium inclut un nombre illimité de robots RPA, et Appian propose une édition communautaire multi-locataire gratuite.

- **Offre produit :** Appian RPA offre une gestion centralisée robuste des processus robotiques via sa console d'opérations (qui remplace Robotic Workforce Manager). Ses fonctionnalités incluent la surveillance en temps réel des activités des robots, la planification des tâches robotiques et des pistes d'audit détaillées à des fins de conformité. Cette approche centralisée facilite la gestion efficace des processus d'automatisation, garantissant l'efficacité des robots et leur adéquation aux objectifs de l'entreprise.

- **Écosystème :** Appian combine RPA avec sa plate-forme parente d'automatisation des processus métier (BPA)/low-code pour offrir un écosystème unifié qui exploite les capacités de la société mère, telles que la sécurité de niveau entreprise, les pistes d'audit et les contrôles d'accès basés sur les rôles, s'alignant bien sur les secteurs réglementés .

Précautions

- **RPA focus:** Appian's RPA product roadmap heavily focuses on integration and orchestration across its broader BPA platform. While improvements to AI image detection and Appian Operations Console enhance its RPA, the majority of Appian innovation focuses on other aspects of the Appian automation platform. Nearly all of Appian's RPA customers use Appian's BPA/low-code application platform (LCAP) solution.

- **Visibility:** Appian RPA lacks strong stand-alone brand awareness and is typically not considered unless an organization is already using the Appian platform for business process management. Gartner rarely receives inquiries about Appian RPA unless the client is already using the Appian platform.

- **Marketplace:** Unlike leading RPA vendors that offer extensive marketplaces with thousands of prebuilt bots and reusable components, Appian does not provide a comparable public repository. This absence means that organizations often need to develop bots from scratch.

Automation Anywhere

Automation Anywhere is a Leader in this Magic Quadrant. Its RPA product is part of the Automation 360 platform, which include Process Composer, Automation Co-Pilot, Bot Runner, Automation Workspace and integration. Add-ons include the COE manager and marketplace integration in the form of the Bot Store.

Automation Anywhere has global operations. Its customer base includes large enterprises and small and midsize businesses. Its top industry verticals are banking, manufacturing and healthcare.

Automation Anywhere's RPA roadmap includes executing UI automations in GUI-less cloud environments such as containerized bots, guardrails ensuring personally identifiable information (PII) security, macOS support and web triggers facilitating event-based automations.

Strengths

- **Product features:** Automation 360 promotes code reuse through templates, tasks and rich forms, while offering over 1,200 prebuilt automations. Its Generative Recorder enhances resilience by leveraging "computer use" to automatically correct automations for web UI changes. By summer 2025, Automation 360 plans to integrate the Temporal engine enhancing process orchestration capabilities.

- **Vertical strategy:** Automation Anywhere excels in vertical strategy with a focus on key sectors and strategic partnerships, developing specific solutions for its top industries. Its approach includes vertical-specific acceleration programs, consulting services and a marketplace of prebuilt assets.

- **Customer experience:** Automation Anywhere offers comprehensive global support in multiple languages and 24/7 shift coverage from seven service centers. It offers a blueprint for scaling automation journeys throughout the customer life cycle. Its Pathfinder customer success program has been highly regarded by Automation Anywhere's largest customers.

Cautions

- **Pricing:** Automation Anywhere offers a base package and an enterprise package, with the latter priced higher than competing offerings. Both packages include the products that customers need to get started with RPA, but some features, such as CoE Manager, are not included in either package. Several customers have complained about renewal proposals that included unrequested and expensive agentic capabilities.

- **Geographic strategy:** The number of unique organizations paying for RPA licenses decreased in several geographic regions in 2024 compared to 2023, including North America, Latin America, Europe and China. While the overall spend of their customers has increased, this trend might suggest challenges in broader market penetration or a strategic focus on larger enterprise accounts.

- **RPA focus:** Automation Anywhere is openly focused on agentic automation and has signaled a reduction in RPA-specific R&D compared to previous years. Organizations focused on traditional RPA should ensure that Automation Anywhere's RPA product roadmap will continue to provide the innovation and newer AI-enabled features they require.

EvoluteIQ

EvoluteIQ is a Niche player in this Magic Quadrant. EvoluteIQ's primary RPA product is available through its EIQ platform offerings. EIQ is available both on-premises and in the cloud. The majority of its customers develop automations in its single developer experience, RPA Studio.

The majority of EvoluteIQ's customers are large enterprises based in North America and Europe. Its top industry verticals are banking, financial services and insurance (BFSI) and healthcare.

EvoluteIQ's RPA product roadmap includes enhancements to its action center and EIQ RPA insights, audit trails ensuring security and compliance, dynamic selector adaptation, and self-healing bots.

Strengths

- **Product features:** EIQ facilitates bot development with a chatbot-based interface for citizen developers and fusion teams. It features an orchestrator for multivendor RPA

integration and management, along with a Kanban view for visualizing and collaborating on automation life cycle management.

- **Pricing:** EIQ offers a flexible pricing model with annual subscription options for its three platform editions: EIQ Lite, EIQ BPA and EIQ Enterprise, typically with three- or five-year contracts. The licensing includes unlimited bots and users, which eliminates complexity. Customers can also purchase stand-alone licenses or opt for consumption-based pricing for specific needs.

- **Connector ecosystem:** EIQ's connector ecosystem includes over 400 prebuilt libraries and 650 Citrix-based actions, supporting RPA, enterprise service bus (ESB), data, web service and custom Java connectors. This range of prebuilt integrations can accelerate development and connectivity with a diverse range of applications.

Cautions

- **Viability:** Limited public data on customers and financial figures may hinder prospective customers' due diligence and make it difficult to compare with competitors. EvoluteIQ has fewer customers across all geographies compared to its peers.

- **Geography:** EvoluteIQ's direct sales currently have a stronger focus on the U.S. and Europe, with expansion into newer markets planned for 2025. Organizations outside these core regions may experience differences in direct support and engagement.

- **Development features:** The platform does not natively support real-time collaboration between different personas during maintenance, support, testing and deployment activities. This could impact the efficiency of fusion teams working on automation projects.

IBM

IBM is a Niche Player in this Magic Quadrant. Its RPA product, IBM Robotic Process Automation, is part of its broader Cloud Pak for Business Automation.

IBM has geographically distributed operations. Its customers range from small to large enterprises.

IBM did not respond to requests for supplemental information. Gartner's analysis is therefore based on other credible sources.

Strengths

- **Viability:** As one of the largest global technology providers, IBM has offices, staff and partners in nearly every region. Its vast reach provides customers with access to resources and support, bolstered by its multibillion-dollar consulting business.

- **Customer experience:** Feedback on IBM's global support team has historically been positive, although Gartner has limited insight on RPA-specific support.

- **Product execution:** IBM's RPA product provides good screen-scraping capabilities, which serve as the product's foundation. The RPA product's integration with IBM watsonx provides AI-augmented capabilities for end users.

Cautions

- **Visibility:** IBM RPA remains relatively obscure to potential buyers. IBM RPA users mostly utilize IBM products and seek to enhance automation and integration capabilities through IBM Cloud Paks. IBM RPA is seldom mentioned by Gartner clients in inquiries.

- **Product features:** Historically, IBM did not support the installation of RPA tools in Citrix or other remote desktop protocol (RDP) environments. IBM RPA relies on computer vision for UI object identification, but traditionally this approach has resulted in less resilient automations. Buyers with a heavy reliance on Citrix and RDP applications should ensure IBM RPA can meet their organizational needs.

- **RPA focus:** Compared to other vendors in this research, IBM has demonstrated little innovation or investment in RPA beyond integrating RPA into its automation portfolio. Similar to other vendors that have acquired RPA providers, IBM's RPA strategy may be to defend its existing automation business as opposed to building a market-winning RPA solution.

Laiye

Laiye is a Niche Player in this Magic Quadrant. Its RPA product, Laiye Work Execution Platform, includes Automation Creator as the core module for RPA development.

Laiye's operations are mainly in China and Southeast Asia. Its customers are mostly midsize and large enterprises. Laiye's top industry verticals are manufacturing, BFSI and energy.

Laiye's RPA product roadmap includes its GenAI assistant functionality for UI automation code generation, code detection, and automatic test-case generation. It also offers an object

model diagram to better understand the flow of the process, and enhanced screen scraping for Linux bots.

Strengths

- **Product interface/integration:** Automation Creator aids citizen developers with a visual interface and AI assistance. Laiye integrates with enterprise applications and cloud services, provides script-migration tools, and enhances reliability through self-healing capabilities using UI elements and large language model (LLM) prompts.

- **Market understanding:** Laiye identifies key customer needs, such as enhanced COE management, ROI analytics and GenAI. Its focus on simple pricing models and the exploration of consumption-based pricing demonstrates its awareness of pricing's impact on customer engagement and satisfaction.

- **Community ecosystem:** Laiye says it has over 70,000 partner employees trained on its solution and a community of over 800,000 developers. RPA buyers in China have access to a wide range of local resources to support them with their RPA initiatives.

Cautions

- **Product gaps:** Laiye currently exhibits gaps in its offerings, including limited support for virtual machines on platforms such as Google Cloud Platform (GCP) and Amazon EC2, and a lack of direct connectors for applications operating on Amazon Workspaces and Azure Virtual Desktop.

- **Geographic strategy:** The majority of Laiye's clients are in China, although Laiye does have clients throughout the Asia/Pacific region. This geographical concentration could expose Laiye to regional economic or political risks and might indicate a weaker penetration in other global markets despite efforts in emerging markets.

- **Viability:** Laiye reported a profit in the last quarter of 2024, and projects profitability for FY25. Despite this, potential customers should be mindful of Laiye's current revenue mix of mostly smaller long-term contracts, and the impact that ongoing strategic investments — particularly in LLM and AI agent capabilities — could have on its financial performance.

Microsoft

Microsoft is a Leader in this Magic Quadrant. Its RPA product, Power Automate, is orchestrated from the Microsoft Azure cloud. The majority of its customers develop UI

automations in Power Automate for desktop.

Microsoft's operations are global. Its customer base includes large enterprises and small and midsize businesses (SMBs). Microsoft's top industry verticals are healthcare, manufacturing and retail.

Microsoft's RPA roadmap includes enhancements to Copilot in Power Automate to improve the development and management of automations through natural language, the integration of "computer use" capabilities to improve runtime self-healing, and expansion of its hosted machines infrastructure.

Strengths

- **Pricing:** Microsoft remains a lower-cost alternative, with pricing often 30% to 50% lower than its competitors. Many customers are drawn to using Power Automate by its low starting price and its widespread availability (a limited version is preinstalled with Windows 11).

- **Geographic strategy:** Power Automate can appeal to a wide range of global buyers because of Microsoft's huge customer base, large partner network and support for 42 languages. This has contributed to Microsoft's position as the fastest-growing RPA provider in terms of RPA revenue.

- **Microsoft product integration:** Power Automate excels at integrating across Microsoft's portfolio, including Microsoft 365, Dynamics, Power Platform, Azure and Copilot. Integration with Microsoft 365 is particularly valuable since office applications (including Word, PowerPoint and Excel) are a top-three target for integration across nearly all RPA providers.

Cautions

- **Licensing:** A common misperception is that Power Automate is free. Power Automate includes multiple capabilities, such as iPaaS, IDP and process mining, with varying levels of access to Windows and Microsoft 365. Buyers, channel partners and even Microsoft sales teams have an inconsistent understanding of Power Automate licensing, creating confusion. Also, buyers often need to pay additive costs for Azure and Dataverse to use Power Automate.

- **Product usage:** Based on thousands of Gartner client inquiries, large organizations rarely use Power Automate as their primary RPA tool. Power Automate is most often used for

automating Microsoft applications, citizen development or as a negotiating lever against a primary RPA vendor.

- **Product capabilities:** Multiple clients migrating from other RPA tools cite challenges with Power Automate, including limited training materials, development capabilities, ability to support long-running processes and cloud updates breaking working automations. Most cite a greater need for maintenance activities in Power Automate versus other solutions.

Pegasystems

Pegasystems is a Challenger in this Magic Quadrant. Its RPA product, Pega Robotic Process Automation (a combination of Pega Robot Studio and Pega Robot Runtime), is part of the Pega Infinity platform. Pega can be orchestrated both on-premises and in the cloud.

Pegasystems' operations are geographically distributed. Its customers tend to be large enterprises.

Pegasystems' RPA roadmap includes improved automation of tables in web browsers, hosting RPA desktop binaries in Pega Cloud, simultaneously automating multiple Google Chrome/Microsoft Edge windows that are operating under different user profiles, and a new task modeler that will provide a central location for all automation ideas.

Strengths

- **Automation capabilities:** Pega offers robust interaction between users and robots through its Deep Robotics technology, which operates at the object level within applications. The integration of Pega RPA within the broader Pega Infinity platform strengthens attended automation capabilities.

- **Market execution:** Pegasystems has effectively cross-sold its RPA product to existing customers by offering flexible licensing for the Pega Infinity platform. It has attracted new users with tools that enhance collaborative automation development. Pegasystems has expanded its market presence through Pega Launchpad.

- **AI strategy:** Pega has deeply integrated AI into its RPA platform to enhance various aspects, including Pega X-ray Vision, an AI-enabled capability that enables accurate screen scraping by identifying the best attributes of application controls. Furthermore, GenAI is being incorporated for code generation, workflow design, documentation and developer assistance.

Cautions

- **Business model:** Pegasystems mostly sells RPA as a complement to the other features of its Pega Infinity platform, although the frequency with which RPA is included has declined among Gartner clients. For customers looking for an RPA solution for tactical purposes, other vendors might offer more straightforward capabilities at a more affordable price.

- **RPA innovation:** Pega's product roadmap for 2025 is heavily focused on GenAI, agentic AI and its application builder, Blueprint. While there are planned enhancements to its RPA offering, the majority of Pega's innovation appears to be focused on other parts of the Pega platform.

- **Customer base:** A high proportion of Pega's customer base consists of large enterprises. Midsize and, especially, small businesses may find the combination of technical requirements, contract size, contract commitments and vendor lock-in risk to be a barrier to exploring Pega RPA.

Salesforce

Salesforce is a Visionary in this Magic Quadrant. Its RPA product, MuleSoft RPA, is part of Salesforce Flow Automation. Its primary RPA development experience is RPA Builder, a desktop application. RPA orchestration is only available as a cloud service.

Salesforce's operations are geographically distributed. Its RPA customers tend to be midsize and large enterprises. Salesforce's top industry verticals are financial services, technology and healthcare.

Salesforce's RPA roadmap includes the consolidation of automation tools into its Flow Builder experience, making RPA bots available to Agentforce, the incorporation of "computer use," (see the Market Overview section) and improving enterprise scaling and management capabilities.

Strengths

- **Packaging:** Unlike most other automation providers that sell tiered access platforms or unit-based (e.g., bot, developer, server) pricing, Salesforce offers a consumption-based model with access to a broad range of automation components, including RPA. This uncommon approach provides buyers with a flexible way to use RPA as part of their automation strategy.

- **Viability:** Salesforce's extensive customer base provides an audience that would benefit from its RPA solution. Combined with global reach and a large, engaged partner network, Salesforce can support and deliver an RPA solution that meets many existing customer needs.

- **Product:** Salesforce has the ability to orchestrate across multiple RPA platforms and provide aggregated analytics. This multiplatform orchestration will simplify the transition and management of bot operations for customers that want to migrate to Salesforce from another vendor or use a multivendor strategy.

Cautions

- **Pricing:** Salesforce's entry-point offering remains higher priced than most of its competitors. While this offering does provide flexible access to multiple automation technologies, including RPA, it may dissuade buyers seeking a lower-cost entry point to begin their organization's automation journey.

- **Visibility:** Inquiries on Salesforce RPA predominantly come from Gartner clients using the vendor's other solutions, such as its CRM or LCAP platforms. While this trend is similar for other vendors that have acquired their way into the RPA market, potential RPA buyers should ensure that Salesforce RPA fits into their organization's broader Salesforce strategy.

- **Citrix and RDP automation:** Salesforce is one of the few RPA providers that does not support the installation of RPA tools in Citrix or other RDP environments. Salesforce RPA relies on computer vision for UI object identification, but traditionally this approach has resulted in far less resilient automations because the ability to capture environmental data and associated object metadata is important for reliable UI integration. Buyers with a heavy reliance on Citrix and RDP applications should ensure that Salesforce RPA can meet their organizational needs.

Samsung SDS

Samsung SDS is a Niche Player in this Magic Quadrant. Its RPA product, the Brity Automation Platform, includes separate design studios for technical developers and citizen developers.

Samsung SDS's operations are mainly in South Korea, and its customer base is mostly midsize and large enterprises in Asia/Pacific. Samsung's top industry verticals are banking, financial services and insurance, government, and manufacturing.

Samsung SDS's RPA roadmap includes enhanced object recognition through UI understanding, and expanding autohealing recovery coverage and data control and management through the Automation Trust Layer.

Strengths

- **Viability:** Brity Automation experienced a 15% increase in unique paying customer organizations in the Asia/Pacific region. In addition to reporting revenue of $10.6 billion in 2024, Samsung SDS is investing in core AI areas and partnering with technology leaders to enhance Brity Automation's capabilities.

- **Customer experience:** Samsung includes a global contact center for initial inquiries and a dedicated customer support group within the automation team for proactive engagement and deeper-level assistance. Furthermore, Samsung established a group in 2024 to provide more proactive customer management, address field needs and prevent customer churn.

- **Sales strategy:** Samsung focuses on expanding recurring revenue from mature RPA customers and leveraging its broader Samsung SDS ecosystem for cross-selling opportunities. There's a clear strategy to nurture existing high-value customers by providing automation roadmaps and expanding the partner network through a tiered program.

Cautions

- **Visibility:** Samsung SDS has a limited geographic presence outside of Asia/Pacific, which may deter customers in other regions. Gartner clients do not typically shortlist Samsung SDS when evaluating RPA products, and Gartner receives relatively few inquiries about its RPA products.

- **Product features:** Samsung does not support Amazon EC2, GCP or Oracle virtual machines (VMs). Brity Automation lacks a dedicated test case management module. Its collaboration capabilities for developers and the number of online assets available in its marketplace are limited compared to competitors.

- **Market record:** Compared to other RPA providers in this Magic Quadrant, Samsung SDS has a significantly higher proportion of SMB customers than enterprise. Large enterprise buyers should ensure that Samsung can meet their needs.

SAP

SAP is a Challenger in this Magic Quadrant. Its RPA product, SAP Build Process Automation, is a unified solution that also offers workflow and business rules management. SAP Build Process Automation is part of the SAP Build offering and plays a role in SAP's enterprise automation strategy.

SAP's operations are geographically distributed. Its customers tend to be midsize to large enterprises. SAP's top industry verticals are utilities, energy and technology.

SAP's RPA roadmap includes AI-powered monitoring, self-healing and error classification, expanding automation scenarios through SDKs developed by ecosystem partners and enhanced with multichannel notifications, and supporting SMS, Microsoft Teams and other channels.

Strengths

- **Product execution:** SAP Build Process Automation offers a collection of over 600 prebuilt packages designed for various industries. It includes the ability to generate workflows and automate decision making using natural language. The desktop agent includes an RDP manager for handling remote sessions, enabling UI-based automation for applications.

- **SAP integration:** SAP Build Process Automation tightly integrates with solutions across the SAP portfolio. Multiple SAP solutions and packages include credits that provide access to SAP RPA. The use of SAP Build avoids indirect access license fees commonly incurred when other RPA tools interact with SAP platforms like S/4HANA.

- **Ecosystem:** SAP's extensive ecosystem, which features over 3,000 partners and one of the largest customer bases licensed to use SAP Build Process Automation, provides substantial resources and support for customers that are aiming to advance their automation efforts.

Cautions

- **RPA focus:** SAP focuses on its enterprise automation platform and its integration with the greater SAP platform. While this strategy may appeal to large and midsize enterprises that primarily use SAP's other solutions, such as ERP, it does not appeal to buyers that only want RPA for tactical automation.

- **Product features**: SAP limits collaboration channels and deployment options when compared to its peers. It does not support VMs on Amazon EC2, GCP, Oracle and others.

SAP does not offer a tool for RPA project planning/scrum planning.

- **Product strategy:** SAP entered a solution extension partnership in 2024 with UiPath that enables customers to use SAP and UiPath automation capabilities within a single environment. Only a few dozen of SAP's extensive application partner base have reached this type of agreement. In Gartner inquiries, SAP customers have questioned whether this signals SAP's reduced commitment to its RPA product.

ServiceNow

ServiceNow is a Visionary in this Magic Quadrant. Its product is named ServiceNow RPA Hub. It has one primary RPA development environment, the RPA Desktop Design Studio, and RPA orchestration is available either on-premises or through public and ServiceNow cloud.

ServiceNow's operations are geographically distributed. Its customers tend to be midsize to large enterprises. ServiceNow's top industry verticals are financial services, manufacturing and technology.

ServiceNow's RPA roadmap includes text-to-bot development via natural language prompts, multi-LLM model support that offers flexibility between small and large language models for bot design, and delivering attended automation by enabling conversational AI agents to trigger local desktop actions using OS-native capabilities.

Strengths

- **AI-powered automation:** Alongside Now Assist, ServiceNow RPA provides GenAI-based automation design, which reduces development time and simplifies bot creation for nondevelopers. Built-in ML models enhance screen element recognition and task prediction.

- **Developer focus:** Unlike most RPA providers, ServiceNow openly targets professional developers over citizen developers and fusion teams. ServiceNow has used its knowledge of software development life cycle (SDLC) best practices to deliver strong RPA development capabilities. These include built-in source control features, version control, collaboration tooling, automation value identification, prioritization frameworks and GenAI-assisted development.

- **Viability:** With over 8,000 customer logos and 2,000 partners globally, ServiceNow has an engaged ecosystem that would benefit from its RPA solution. ServiceNow's reach and

portfolio of enterprise solutions minimize the vendor risks present among its smaller competitors.

Cautions

- **Visibility:** Inquiries on ServiceNow RPA predominantly come from Gartner clients that use the vendor's other solutions, such as its IT service management (ITSM) or LCAP platforms. Unlike competitors, ServiceNow RPA Hub is not positioned or marketed as a stand-alone RPA platform, which may impact awareness and adoption in RPA-focused evaluations outside of existing ServiceNow clients.

- **RPA focus:** Compared to market leaders, ServiceNow RPA is relatively new and has limited production-scale deployments in complex use cases across large enterprises. The platform is still maturing in RPA-specific features like advanced exception handling and citizen development. The RPA-specific ecosystem (bots, connectors, templates) is not as developed as other established RPA vendors.

- **Product:** ServiceNow customers have observed reliability issues with UI interactions in certain unattended scenarios when communication is disrupted with the environments where RPA bots execute. Prior to publishing RPA-based automations into production, organizations should perform testing on UI interactions with a focus on high-latency or disconnected RDP session scenarios.

SS&C Blue Prism

SS&C Blue Prism is a Leader in this Magic Quadrant. Its RPA product, SS&C Blue Prism Automation Suite, integrates with SS&C Blue Prism's Chorus BPA, IDP and process mining capabilities, among others. In 2024, SS&C Blue Prism launched Blue Prism Next Generation Platform (Next Gen), a cloud-native platform with a range of capabilities and deployment options for enterprise customers.

SS&C Blue Prism has geographically distributed operations. Its customers include large enterprises and SMBs. Its top industry verticals are BFSI and healthcare.

SS&C Blue Prism's RPA roadmap includes a GenAI governance framework called SS&C AI Gateway, an enhanced application modeler that includes support for legacy applications and codebases, and the expansion of Digital Exchange (DX) to include more prebuilt API integrations and intelligent automation skills.

Strengths

- **Customer experience:** Gartner clients like multiple aspects of Blue Prism's delivery and support. This includes Blue Prism's Robotic Operating Model, its implementation methodology, as well as positive experiences with customer success and customer support. Blue Prism says it has a 94% customer satisfaction rate for support requests.

- **Product portfolio:** Blue Prism's product features include Smart Vision, which enables digital workers to recognize application elements based on visual cues, and the Next Gen Process Repository, which stores processes and objects to support automation development.

- **Pricing:** SS&C Blue Prism has expanded its pricing structures, offering several plans that offer more flexibility than its competitors. These include concurrent sessions (for Next Gen and Desktop), as well as a per-process model and fully managed and hosted services. It continues to offer its traditional license plan, Digital Worker.

Cautions

- **AI focus:** SS&C Blue Prism is catching up to competitors in offering advanced GenAI and agentic automation features. Blue Prism's GenAI offerings are primarily text-based, focusing on document processing and summarization. Competitors offer more versatile AI functionalities, which may limit its appeal to organizations seeking AI-driven automation solutions.

- **Innovation:** Some Gartner clients express frustration with Blue Prism's speed of innovation in core RPA capabilities including attended automation, citizen development, computer use and GenAI development. Blue Prism's approach relies heavily on its traditional Design Studio, which requires more automation design experience.

- **Visibility:** Among Gartner clients, SS&C Blue Prism does not seem to generate the same level of interest compared to its peak in 2020. Since then, Gartner has observed a decline in the annual volume of inquiries and contract reviews that mention SS&C Blue Prism.

UiPath

UiPath is a Leader in this Magic Quadrant. Its RPA product is part of the UiPath Platform. The core RPA product is a cloud-native offering with design studios tailored to both technical and business developers.

UiPath has global operations and serves every buyer segment. Its top industry verticals are manufacturing, BFSI and government.

UiPath's roadmap for RPA includes expanded GenAI support for natural language development, improved self-healing during automation runtime, and expanded macOS automation.

Strengths

- **Viability:** UiPath remains the largest vendor in terms of RPA-specific revenue and receives the greatest volume of client inquiries on RPA-specific topics. UiPath has a global presence, a large partner ecosystem and customers across multiple industry verticals.

- **Customer ecosystem:** UiPath provides its customers with the largest RPA-specific ecosystem. This includes UiPath's claims of having more than 10,000 enterprise customers, 6,000 system integrator partners, 3 million UiPath Community members, and over 380,000 trained on UiPath skills through its academic alliance of more than 2,200 universities.

- **Developer support:** Unlike the majority of other vendors in the market, UiPath provides development studios tailored to different personas, including professional developers, citizen developers, fusion teams and automation testers. Client feedback is positive, particularly for the citizen developer experience.

Cautions

- **Sales execution:** Clients frequently complain about UiPath's high annual price increases, forced solution bundles, or the unrequested addition of agentic capabilities in contract renewals. Gartner has observed that most UiPath contract renewal proposals are roughly 20% higher than previous years, whether clients requested additional capabilities or not.

- **Product strategy:** UiPath is focused on agentic capabilities as the future for the company. This strategy means resources and attention may shift away from core RPA capabilities. For example, many questions in our vendor survey that explicitly asked about RPA were answered with loosely related agentic capabilities. Buyers interested in traditional RPA should verify that UiPath's RPA product roadmap consistently delivers the innovation they need.

- **Customer feedback:** UiPath's RPA product has received critical feedback from customers in both Gartner inquiries and Gartner Peer insights data. Common challenges cited

include resource requirements for the UiPath platform, inefficient customer support, and inconsistent delivery from system integrator partners.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- EvoluteIQ

Dropped

- **Nintex** was dropped from this research as it did not meet the inclusion criteria for the combination of customer interest, growth and revenue from its RPA product

Inclusion and Exclusion Criteria

To qualify for inclusion in this body or research, vendors had to:

- Demonstrate a clear and active go-to-market and sales strategy, primarily for RPA software, as demonstrated by their website, reviews on Gartner's Peer Insights forum, social media communications, and direct or indirect marketing materials that explicitly mention RPA.

- Sell RPA software directly to paying customers without engaging professional services. Vendors had to provide at least first-line support for their RPA capabilities. They must not sell their RPA product solely to, and for the use of, its professional services and consultants.

- Offer a commercially supported enterprise offering — in other words, vendors must not offer their platforms as open-source software.

All vendors also had to demonstrate presence in multiple regions, with at least 30 paying RPA customers (unique logos) each in at least two of the following regions as of 31 January 2025:

- North America

- Latin America

- Europe, the Middle East and Africa

- Asia/Pacific, including Japan and China

They also had to have:

- A minimum consolidated customer interest (CCI) score greater than 30 (see Note 1).

Vendors had to satisfy one of the following three criteria:

- At least $50 million in revenue in the financial year 2024 (FY24) from sales of RPA software licenses, excluding revenue from professional services, consulting and any system integrator support (see Note 2).

- At least $30 million in revenue in FY24 from sales of RPA software licenses, excluding revenue from professional services, consulting and any system integrator support, year-over-year revenue growth of at least 25% in FY24 from sales of RPA software licenses, and a minimum CCI score greater than 37.

- A minimum CCI score greater than 73.

Vendors also had to offer the following capabilities natively within their RPA platform or product as of 31 January 2025:

- Screen-scraping with at least five UI connectors from the following list:

  - Selenium IDE

  - Microsoft Active Accessibility

  - Microsoft UI Automation

  - Java application connector

  - SAP WinGUI

- Windows GUI

- Mainframe emulator

- Enterprise IT capabilities, including disaster recovery environments, high-availability support, CI/CD, software development life cycle management and multipersonal collaboration within the RPA software.

- Support for RPA script development with standard programming languages or vendor-specific low-code representations, including graphical development.

- Ability to record tasks and convert them into scripts that can be deployed.

- Support for both attended and unattended automation.

- Ability to orchestrate and administer users, scripts and the runtime, including configuration, monitoring and security (a central orchestrator or control panel/administrative component is essential).

- Ability to deploy bots in all of the following environments:

  - Desktops

  - Virtual machines

  - Public and private clouds

We excluded vendors that:

- Did not offer integration via screen scraping.

- Offer only platform as a service (PaaS) or back-end services without a desktop runtime component, an orchestration component, and a front-end development tool/integrated development environment to build the scripts/automation.

- Required a specific third-party component or product, or a white-labeled product, to support core RPA functions.

- Only sold their RPA product as licensed software along with development/professional services, where the product was used exclusively by the vendor's consultants/service providers.

- Did not offer a commercial enterprise RPA offering (that is, they offered a platform only as open-source software).
- Would retire their platform by the end of 2025.

Evaluation Criteria

Ability to Execute

Gartner evaluates how well vendors' processes, systems, methods and procedures enable them to be competitive, efficient and effective.

Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	Low
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (June 2025)

Completeness of Vision

Gartner also evaluates how well vendors demonstrate understanding of the RPA market's current and future direction — including in relation to innovations, customer needs and competition — and the degree to which their vision aligns with Gartner's. This includes vendors' ability to anticipate market forces and create new market opportunities.

Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (June 2025)

Quadrant Descriptions

Leaders

Leaders have an insightful understanding of the RPA market, a reliable track record, the power to influence the market's direction, and an ability to attract and retain customers.

In the RPA market, Leaders demonstrate understanding of enterprise customers' needs and of opportunities to expand functionality, and add new products and services to their core RPA offerings. Simply put, a Leader must have a market-leading vision and the ability to deliver on that vision.

A Leader may not always be the best choice for every customer. A focused, smaller vendor can sometimes provide superior support and commitment. Other vendors may provide a specialized capability that is essential for some organizations, such as enhanced security or specific features or functions (required, for example, by call centers and individual desktop use cases). A vendor that focuses on RPA for a specific vertical market or a limited geographic area may not be a Leader in the overall market, but it may be a competitive option within its chosen market or area.

Challengers

Challengers excel at attracting a large customer base, but are often limited to one part of the market.

In this market, Challengers often use RPA to bolster their broader automation platforms. Challengers rarely obtain new customers with RPA, but upsell RPA to existing customers to round out those customers' automation capabilities.

A Challenger must demonstrate sustained excellence in execution and a significant following — a combination that few vendors have achieved in this dynamic, nascent market.

A Challenger may become a Leader if it adopts an aggressive, innovative strategy to expand its focus to encompass the entire market. It would also need to demonstrate exceptional insight into the market's direction and continue to execute excellently.

A Challenger may alternatively become a Visionary by sacrificing growth and instead focusing on developing innovative, differentiating features and capabilities.

Visionaries

Visionaries are a market's innovators. They propel a market forward by responding to emerging customer demands and offering customers new opportunities to excel.

Visionaries must also show insightful understanding of market trends and innovative strategies for marketing and sales, as well as for product and business management.

Typically, these vendors appeal to leading-edge customers. A Visionary's ability to deliver sustained, dependable execution in the mainstream enterprise market has yet to be tested sufficiently.

A Visionary could eventually grow to become a Leader. Alternatively, a Visionary may become a Niche Player if it decides to limit its target market by focusing on its core competencies, technologies or existing customers. Equally, a Visionary could become a Challenger by developing its specialties in order to advance in terms of execution.

Niche Players

Niche Players typically specialize in a limited vertical or functional area, or have a strong product that is limited to fewer parts of the market or only one part.

In the RPA market, Niche Players also include vendors that focus on other software markets, but that are moving into the RPA market.

In the RPA market, Niche Players:

- Focus primarily on related tools, rather than RPA capabilities.

- Have yet to demonstrate excellent execution and success in terms of visibility, market share and buyer interests.

- Have limited geographic reach.

- Exhibit an unclear vision.

- Focus only on a subset of use cases.

Niche Players often represent the best choice for a specific category of customer or a particular use case. They typically offer specialized expertise, focused support practices, flexible terms and conditions, lower costs, and greater commitment to a particular market segment and its customers.

In this fast-evolving market, opportunities exist in all directions. Some Niche Players are poised to improve their execution and evolve into Challengers. Others may become Visionaries by developing innovative solutions that attract interest beyond their niche segments. Still others may strengthen and broaden their businesses to become Leaders.

Context

The RPA market includes a diverse range of options including providers that primarily grew through RPA, megavendors that used acquisitions to enter the market, and regional players that focus on specific geographies.

New buyers of RPA solutions must ensure that their chosen provider can meet their immediate short-term needs for UI integration and intuitive design and development capabilities. Existing RPA users should ensure that their current provider is continuing to innovate on core RPA capabilities while offering complementary automation and integration solutions that support a broader enterprise automation strategy.

Organizational needs for RPA often evolve over time. New RPA buyers frequently prioritize price, ease of development and quick ROI. More experienced buyers will value analytics, governance and stability. Use **Optimize Automation Using the Hyperautomation Maturity Model** to understand what similar organizations value today and what you should prioritize in the future.

Market Overview

The RPA market is at a pivotal inflection point. In 2024, the market generated $3.8 billion in revenue representing a healthy 18% increase YoY, compared to the broader infrastructure software growth of 10.7% (see **Forecast: Enterprise Infrastructure Software, Worldwide, 2023-2029, 1Q25 Update**). However, AI innovations have introduced alternatives to traditional deterministic RPA technologies and the rise of enterprise automation platforms such as business orchestration and automation technologies (BOAT) threaten to relegate RPA to a platform feature rather than an automation solution.

As customers evaluate and select RPA solutions, here are three key trends to monitor:

- Computer use

- Agentic automation

- Business orchestration and automation technologies (BOAT)

Computer Use

Introduced by AI providers such as Anthropic and OpenAI, computer use (CU) tools interact with the user interface in a manner similar to RPA. Unlike RPA, which largely depends on predefined automation workflows, CU operates in a more probabilistic manner, which may greatly reduce the maintenance efforts required when the underlying UI changes. UI changes and the accompanying maintenance have historically been a weakness of the RPA market.

To be clear, today's CU tools are not a reliable alternative to RPA use cases, especially for automations that interact with legacy Windows applications (see **How will "Computer Use" Impact My RPA Initiatives?** for more details on the strengths and cautions of current CU solutions). As the technology improves, future CU tools may be able to replicate many of the UI-interaction capabilities of current RPA solutions.

Leading RPA providers are well aware of this threat and working to integrate CU into their automation platforms, but this integration could be limited by CU costs and differences in platform architecture. The future of leading RPA providers may depend on the speed of independent CU innovation versus the ability of RPA providers to effectively integrate CU into their platforms.

Agentic Automation

AI agents are one of the hottest topics in technology. Gartner saw a 750% increase in AI agent related inquiries between the second and fourth quarters of 2024.

Nearly all major RPA providers have released AI agent builder capabilities and are discussing how their broader automation platforms can assist the orchestration and choreography of AI agents. These providers claim that agentic capabilities will be enabled by having integrated, direct access to automation tools like RPA.

AI agents will be able to solve complex problems, process unstructured data, and take actions using both deterministic automation (like RPA) and nondeterministic tools (like CU). The agents will be able to invoke RPA and, conversely, RPA will be able to invoke agents. If the long-term future is autonomous AI agents, the near-term future will be a mix of agents and bots working collaboratively and growing increasingly efficient and effective.

As these technologies evolve and integrate, AI agents will semantically infer the purpose of new application UIs and use integrated RPA to take actions in those application experiences. This possibility will unlock new value from AI and RPA, as well as new threats.

Business Orchestration and Automation Technologies (BOAT)

If agentic automation is the hottest topic across technology, the concept of BOAT is its equivalent across automation markets. All providers in this RPA Magic Quadrant offer more than RPA, and often package technologies like IDP, LCAP, iPaaS and BPA into their broader automation platforms. While this convergence enables organizations to automate a wider range of more complex processes, with greater orchestration across human workers and systems, providers also run the risk of ignoring the requirements of application leaders that only need RPA-specific solutions as opposed to a broader automation platform.

This trend was evident in the responses from vendors for the RFI surveys that Gartner sends for every Magic Quadrant. A surprising number of providers failed to answer questions that explicitly asked about RPA and responded with answers involving non-RPA solutions. This willingness to overlook the RPA market had an impact on how vendors were rated and positioned in this Magic Quadrant

Application leaders searching exclusively for an RPA solution should ensure that their chosen provider can meet their requirements without being oversold on broader automation capabilities that they may not need.

Acronym Key and Glossary Terms

AI	artificial intelligence
API	application programming interface
BPA	business process automation
CI/CD	continuous integration/continuous delivery
CCI	consolidated customer interest
IDP	intelligent document processing
ITSM	IT service management

LLM	large language model
LCAP	low-code application platform
ML	machine learning
OCR	optical character recognition
OS	operating system
RDP	Remote Desktop Protocol
RPA	robotic process automation
SMB	small and midsize businesses
UI	user interface
VM	virtual machine

Note 1: Consolidated Customer Interest (CCI) Score

When evaluating RPA vendors for inclusion in this Magic Quadrant, Gartner calculated a consolidated customer interest (CCI) score for each vendor on a scale of 1 (lowest) to 100 (highest), based on a combination of factors, such as:

- Gartner client inquiry presence and search volume

- Number of Peer Insights competitor mentions on gartner.com

- Social media presence

- Web traffic analysis

- Search trends on third-party search engines

Note 2: Annual Revenue and Customer Numbers

When evaluating vendors for inclusion in this Magic Quadrant, we examined:

- Revenue and customer numbers in FY24 (or, failing that, the calendar year 2024) for RPA software licenses only (excluding professional services, maintenance, free trials and other non-RPA software licenses).

- SaaS subscription revenue (including contract value for calendar year 2024, but excluded any services included in an annual contract).

For multiyear contracts, we included only the contract value for the first 12 months.

Tous les revenus ont été convertis en dollars américains sur une base de devise constante afin de neutraliser l'effet que les taux de change peuvent avoir sur les revenus.

La norme comptable par défaut utilisée était les principes comptables généralement reconnus.

⊕ Définitions des critères d'évaluation

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