ROBOTIC PROCESS AUTOMATION

Embracing the Potential

RESEARCH REPORT

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Introduction

Robotic Process Automation (or RPA for short) is one of the latest emerging technologies in Tech. According to a 2016 report by Grand View Research, the global RPA market is expected to reach USD 8.75 billion by 2024. But what exactly is it and why is it causing such a stir? Is it the latest buzzword, simply re-packaging existing technology like Business Process Management (BPM), or is it helping businesses drive true automation and Artificial Intelligence (AI) as many suggest?

This report will consider some of the key benefits associated with RPA, along with the seemingly huge market potential. And assuming RPA continues to emerge as a truly disruptive technology, perhaps the bigger question we should be asking ourselves is whether the increasing market demand and competitive landscape for recruiting and retaining employees will outpace the supply of Talent? As with any technology exploring new, uncharted waters, there are no guarantees around who is best placed to drive its success. Therefore, if the UK is to establish itself as a champion of Robotics, we must tackle this fundamental question head-on. Now more than ever with the ongoing Brexit negotiations which could massively influence our immigration system, creating a bureaucratic nightmare for employers and ultimately impacting our access to Talent across Europe. However, with big change comes new opportunity and this report will also consider how an uncertain political environment may, in fact, drive the adoption of RPA sooner than expected, providing an opportunity for the UK to emerge as Europe's RPA Centre of Excellence.

RPA – what does it mean and what are the benefits?

Before we begin to assess the benefits of RPA, and indeed whether we will see a Talent gap emerge, we must first understand what it means. So what is RPA? If you do a quick google search, you will see numerous pictures of physical Robots not unlike TV's RoboCop - the cyborg law enforcer which according to a recent Telegraph news report (2017) will also soon be a reality patrolling the streets of Dubai. However, we are talking about Robots in the virtual sense here.

The term RPA was first introduced by Blue Prism, a UK multinational software corporation that pioneered and makes enterprise Robotic Process Automation software, and can be defined as "the application of technology that allows employees in a company to configure computer software or a 'robot' to capture and interpret existing applications for processing a transaction, manipulating data, triggering responses and communicating with other digital systems." (IRPAAI, 2017)

Or more simply put "Robotic automation refers to a style of automation where a machine, or computer, mimics a human's action in completing rules-based tasks." (Blue Prism, 2012). Based on this definition, RPA can be thought of as a software or virtual robot that performs the actions that a human would do. However, what does this mean in practice? The following case study provides a useful example of how RPA can benefit organisations in the real world.

Case Study: The Cooperative Bank (Blue Prism, 2008)

As part of a drive to further improve customer service levels, the Cooperative Bank worked with Blue Prisim on a business process automation project in order to reduce the levels of manual administration in the business and move staff away from time-consuming manual activities and into customer-facing roles. The business case for the project was to save FTE salaries in the first 12 months and to enhance customer service by improving the speed and accuracy of dealing with customer queries. The bank identified 10 processes in total, including Direct Debit cancellation, account closures, foreign payments and internet applications - all of which had a high level of manual intervention and a high number of people managing the process. The project resulted in savings year on year since these manual processes will never again require staff to manage them.

And it's not just major banks that can benefit from RPA. Any company that uses labour on a large scale, where people are performing high-volume, highly transactional process functions, can boost their capabilities and save money and time with RPA software (IRPAAI, 2017). As put by Gartner, the leading market research firm, "potential applications of RPA solutions include traditionally labour-intensive areas such as service desks and customer care centres, as well as a broader range of functions in IT operations, such as network, storage, server and application management, database administration, virtual machine provisioning, process orchestration and teleconferencing." (PR Newswire, 2015).
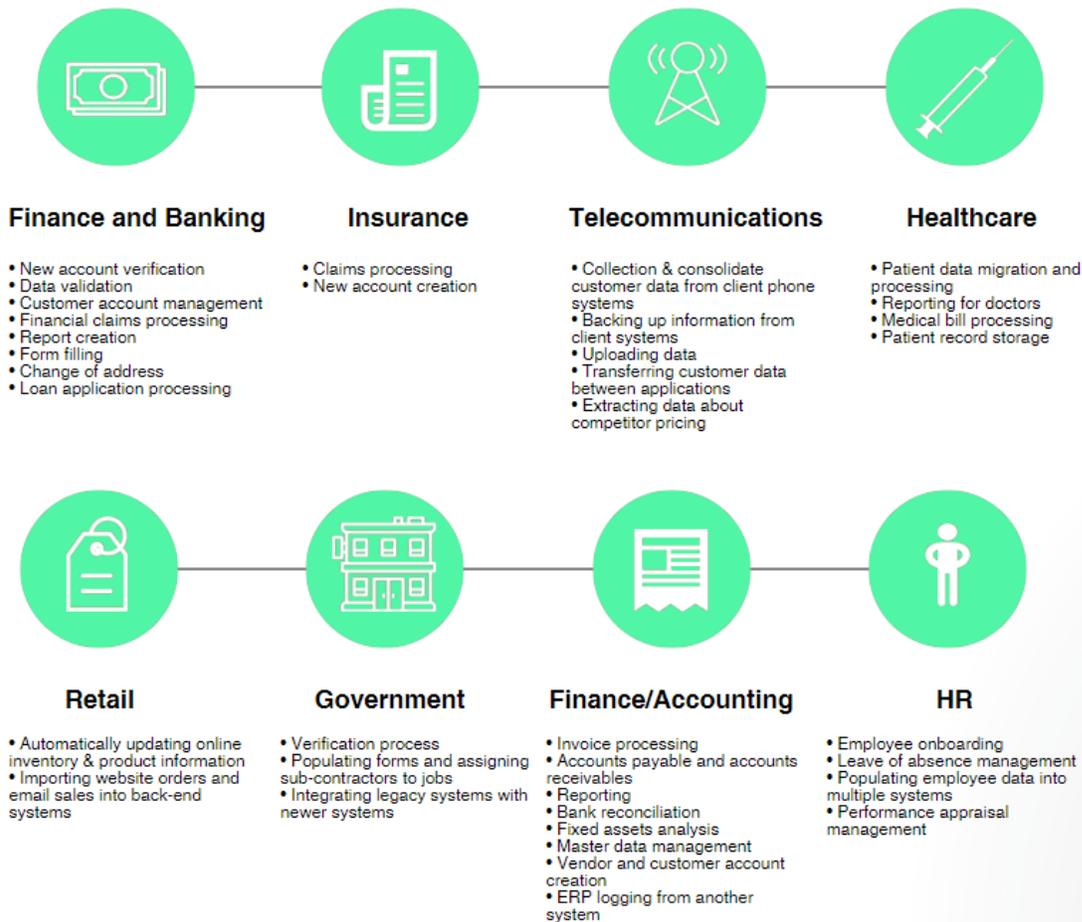
So the opportunity is wide-ranging, and RPA robots are revolutionising the way we think about and administer business processes, IT support processes, workflow processes, remote infrastructure and back-office work. In summary, the more common benefits associated with RPA including:

- Lower COST

- Greater PERFORMANCE & QUALITY

- Advanced ANALYTICS

- Higher EFFICIENCY   *(IRPAAI, 2017)*

The image below provides a list of just some of the real-world business applications where RPA could improve greater efficiency and effectiveness for businesses (Kinetic Consulting Services, 2016).

Areas where RPA could improve greater efficiency and effectiveness for businesses.

Finance and Banking
- New account verification
- Data validation
- Customer account management
- Financial claims processing
- Report creation
- Form filling
- Change of address
- Loan application processing

Insurance
- Claims processing
- New account creation

Telecommunications
- Collection & consolidate customer data from client phone systems
- Backing up information from client systems
- Uploading data
- Transferring customer data between applications
- Extracting data about competitor pricing

Healthcare
- Patient data migration and processing
- Reporting for doctors
- Medical bill processing
- Patient record storage

Retail
- Automatically updating online inventory & product information
- Importing website orders and email sales into back-end systems

Government
- Verification process
- Populating forms and assigning sub-contractors to jobs
- Integrating legacy systems with newer systems

Finance/Accounting
- Invoice processing
- Accounts payable and accounts receivables
- Reporting
- Bank reconciliation
- Fixed assets analysis
- Master data management
- Vendor and customer account creation
- ERP logging from another system

HR
- Employee onboarding
- Leave of absence management
- Populating employee data into multiple systems
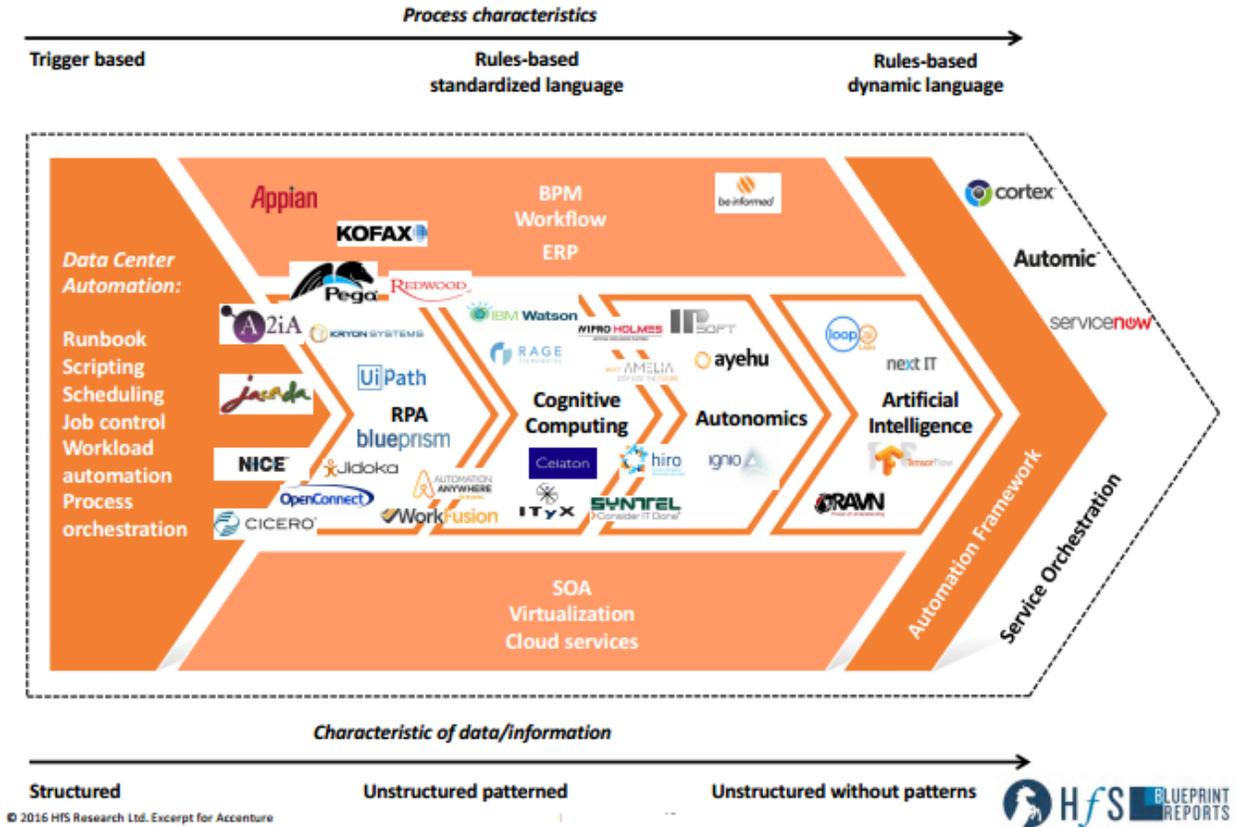- Performance appraisal management

BPM vs. RPA

Is RPA essentially BPM (Business Process Management) repackaged?

Several practitioners I have spoken to argue that RPA is a new spin on existing technology such as BPM (sometimes used interchangeably with Business Process Automation), which has been around for a number of years. Therefore it is important for us to establish how RPA differs from BPM. UiPath – a leading Robotic Process Automation vendor – makes an interesting distinction between both concepts, in that "BPM is not a specific piece of software but an approach to streamlining business processes for maximum efficiency and value. It is an in-depth look at how processes are operating, identifying areas for improvement, and building solutions – usually from the ground up." (UiPath, 2015). If we compare this with our earlier definition of RPA as "software or virtual robot that performs the actions a human would do," this would suggest RPA exists on a more surface level and implemented as part of a process – and crucially this does not involve a recall of the legacy architecture. Actions may include logging into applications, extracting data, moving data, etc. whereas BPM is about making sure the infrastructure of your business processes is robust. So while BPM and RPA are based on the same fundamental principles, I would agree with UiPath that they are not competing, rather they share a common goal with different application strategies. 'Figure A' below provides a useful framework around the Automation lifecycle and demonstrates how these tools have evolved over time, and how they might develop in the future as we journey from BPM to RPA and towards true AI. We can see that BPM, defined as an approach to streamlining business processes for maximum efficiency and value, sits on the outside of the framework, encompassing the specific software technologies like RPA, Cognitive Computing, Autonomics and AI, thus creating a robust infrastructure.

Figure A)

The HfS Intelligent Automation Continuum

Process characteristics

Trigger based   **Rules-based standardized language**   **Rules-based dynamic language**

Data Center Automation:

**Runbook
Scripting
Scheduling
Job control
Workload
automation
Process
orchestration**

Appian   KOFAX   BPM Workflow   ERP   be informed   cortex   Automic

Pega   REDWOOD   IBM Watson   WIPRO HOLMES   IPSOFT   servicenow

A2iA   KRYON SYSTEMS   RAGE   ayehu   next IT   loop

jacada   UiPath   AMELIA

RPA blueprism   **Cognitive Computing**   **Autonomics**   **Artificial Intelligence**

NICE   Jidoka   Celaton   hiro   ignio

OpenConnect   AUTOMATION ANYWHERE   RAVN

CICERO   WorkFusion   ITyX   SYNTEL

Automation Framework   *Service Orchestration*

**SOA
Virtualization
Cloud services**

Characteristic of data/information

Structured   **Unstructured patterned**   **Unstructured without patterns**

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Source: HfS Research, 2016

Today, there are many vendors offering different RPA solutions which we will explore in more detail in the next section of this report (see Appendices). However, the industry is arguably still in a relatively early stage of development. According to Robotics Tomorrow, "most vendors focus on tactical solutions based on rules-based software algorithms versus more sophisticated cognitive computing approaches such as deep machine learning. But, that will soon change. As it does, both the range of processes that can be automated as well as the sophistication of those automations will dramatically increase." (Robotics Tomorrow, 2017).

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Therefore it is our understanding that tomorrow's winners will be those organisations who develop more complex data capture and self-learning capabilities, moving towards true AI. Organisations like Accenture, for example, who are investing in substantial R&D – working together with the University College Dublin at the Accenture Centre for Innovation Lab – "to enable machines to sense, comprehend and act - and learn." (Accenture, 2017). Accenture further strengthened its dominant position in the UK with the recent acquisition of Genfour; a UK-headquartered pure-play automation service provider specialising in assessing, implementing and managing automation solutions. Genfour is now part of Accenture's Automation Center of Excellence in the UK, and their employees will become part of Accenture's Operations Global Intelligent Automation team. Hardly surprising given the market opportunity which we consider in the next section below.

The impact of RPA

Gartner estimates that by 2020, 40% of very large global organisations will have adopted an RPA software tool, up from an estimated less than 10% today. (Genpact, 2017)

Deloitte recently conducted a survey of over 100 Shared Services leaders which showed that they now see RPA as a viable, proven solution, with 74% of survey respondents planning to investigate the technology in the next year and 22% having piloted or wholly implemented RPA. (Deloitte, 2017)

According to **Transparency Market Research**, the global robotic automation market will reach $4.98 billion by 2020, and is forecast to grow at 60.5% CAGR through 2020. (Transparency Market Research, 2016)

And analysis by **McKinsey & Company** puts the opportunity for the automation of knowledge work at $5-7 trillion. (McKinsey & Company, 2013)

So the market opportunity is huge. And RPA presents an exciting opportunity to drive down costs while improving performance and efficiency - so why not embrace it? Those who fall behind the curve will arguably be putting themselves at a substantial disadvantage to their competitors who adopt it. Companies like O2, Aegon and Siemens are already embracing Blue Prism's offering, and among the newly signed 189 license deals in 2016, up from just 40 in 2015. Moreover, in the first five months of their 2017 financial year to 31 March, Blue Prism had signed 151 new software deals (Interactive Investor, 2017). Therefore, assuming the RPA market continues to thrive, perhaps the bigger question we should be asking ourselves is are we facing the next 'War for Talent'?

War for Talent 2.0

The "War for Talent" is a well-known phrase first coined by Steven Hankin of McKinsey & Company in 1997 and refers to an increasingly competitive landscape for recruiting and retaining talented employees, driven by the need for "knowledge-workers." This continues to be the case, now more than ever, as the digital revolution continues to take hold. Technology is making remarkable progress and continues to disrupt in areas such as RPA, AI, Cyber Security, Quantum Computing, IoT and Smart Homes. And the UK market certainly reflects this. Having tracked activity across private equity and venture capital deals, Tech City News (2017) recently reported that the UK saw £6.8bn tech investment in 2016, higher than any other European country. With investment pouring into the sector, it has grown to be a major contributor to the UK economy. Furthermore, the digital economy, which is growing at twice the rate of the wider economy, now contributes around £97bn a year, up 30% in five years, according to the report. UK Prime Minister Theresa May recently commented that "the number of digital tech jobs across the UK has grown at more than twice the rate of non-digital tech sectors, and the Government will expand the scope of our digital tech industries, funding artificial intelligence, robotics, 5G, smart energy and more." (Telegraph, 2017). And growth looks set to continue based on a recent report by BDO (2017), the accountancy and business advisory firm, who predict that the current healthy level of M&A activity will continue into 2017 and that Technology & Media will be by far the strongest sector, accounting for 25% of the total deal pipeline.

Therefore, as technology companies continue to disrupt, businesses will have to innovate at an alarming pace to keep up with the competition. And harnessing disruptive technologies arguably requires a

disruptive approach to finding Talent. So to continue to support the digital agenda and meet this future demand, high-tech businesses will need to work even harder at- and invest even more into bringing in Talent with the right skill-sets into their workforce. And with the threat of a "hard Brexit" looming, the potential removal of the "Freedom of movement of people" act, and the energy expended on these complex negotiations, this will surely only compound the problem. The danger is that we neglect to plan for the continued expansion of our key industries. We must act now to ensure we hit the ground running in 2019, by supporting the Digital Agenda, or face an imminent talent gap, and RPA is no exception.

To combat this, we expect to see more M&A activity in the years ahead. The bigger players will no doubt continue to snap up smaller companies at a time when automation skills are in short supply in the market. The recent acquisition of Genfour by Accenture provides a good example; Genfour has an overall headcount of around 50 which is a nominal amount for Accenture's huge talent pool. However, 50 engineers trained in RPA technology are invaluable on any level. It would appear this was a tactical merger to build Accenture's expertise in digital transformation and RPA capabilities, and stay one step ahead of the competition (CIO, 2017). However, clearly not everyone will be in a position to buy-and-build like Accenture. So where does the existing Talent in RPA come from? The next section of this report will consider who is currently driving this new age technology and provide further insight around where we expect the new breed of Talent to emerge.

New age technology, age-old talent?

Clearly, the Universities are set to shape innovation in the 21st century, underpinning research in a wide range of challenging areas such as Cognitive Systems, Autonomics, and AI, thus producing the next wave of Digital Talent. Therefore we think it is important to consider where the current Executive/Board level Talent comes from to help us understand what type of background and experience is best positioned to evangelise the technology. Furthermore where we think the Talent will emerge in the future to drive the continued success of the UK Robotics industry.

Our research indicates a large proportion of Executive Talent working for RPA vendors/advisors come from the Financial Services sector. Not such a big surprise as the Banking world was one of the first industries to see the power of "process" and became an early adopter of BPM technologies. Often with a

background in IT operations and program management or consulting, this skillset lends itself well to RPA both in terms of understanding technology implementation as well as being one of the key industries adopting the technology. We can see history repeating itself as the banks, financial institutions and insurance companies lead the way by transforming core operations to address significant industry disruptions from FinTech and Digital technologies to improve efficiencies and cost savings. RPA allows these businesses to meet these demands which is why we see FS as the vanguard industry driving RPA, and in our opinion, it will continue to be a frontrunner in the digital age, and we expect see more Talent emerging from this core sector in RPA.

Blue Prism's leadership team provides a good example of this career path. For example, Alastair Bathgate, CEO spent a decade in various management positions at Bradford & Bingley giving him a unique understanding of operational business processes and how technology can be used to improve efficiency and service. Similarly, David Moss, CTO spent five years working for Lynx Financial Systems as a Software Designer, providing packaged and bespoke solutions to major names in Financial Services such as Barclays Bank and Nationwide Building Society. And Neil Wright, Director of Professional Services, has over 20 years' experience delivering enterprise software to both Blue Chip companies such as Lloyds Banking Group, Barclays Bank and Royal Bank of Scotland.

In terms of Enterprise Software experience, we draw some interesting parallels with associated technologies in the digital ecosystem such as Big Data/Analytics which have long been a part of the world of robotics. The very principles of RPA are based on data which can be captured and then used to repeat processes. So robotics has a history of working with Big Data without necessarily classifying it as such. The difference being, robotics goes a step further to take that data and provide self-learning capabilities to solve problems in changing environments. Therefore given the prevalence of Big Data and its wide success across various applications, and sharing the fundamental principles of RPA, we expect to see more Talent progressing from this domain into RPA. What's more, the early adopters of Big Data/Analytics who were attracted by the new and innovative technology at the time will arguably be drawn to the growing excitement around RPA, not to mention its huge market potential.

Looking ahead

It is our understanding that the adoption of RPA is no longer a question of "if" but rather "when." The UK is already the second largest geography for RPA (behind the US) and home to Blue Prism who pioneered the term 'RPA' as well as some of the best pure-play RPA Consulting companies and System Integrators in the world (see Appendix 1). And UK Universities are pushing the boundaries in this field. Together with the drop in the value of the GBP currently making our services more competitive, we hope to see the UK emerge as Europe's RPA Center of Excellence. What's more, the uncertainty around Brexit and the current political environment may, in fact, fuel the adoption of RPA sooner than expected. Historical events can change the speed of adoption of technology, and leadership teams tasked with navigating through this uncertainty will arguably be hard-pressed to innovate (and indeed automate) in an unprecedented way to drive down costs, improve quality and ultimately survive. RPA could be the 'weapon of choice' for many organisations tackling cost reduction with the benefit of a quick ROI. So the sooner we get ready, the better as the industry continues its journey along the automation lifecycle. But crucially to succeed we need to continue to research and identify areas in the technology ecosystem that share similar principles with RPA such as Big Data/Analytics in order to provide a source of Talent with the transferable skill-sets, allowing RPA and other digital technologies to continue to thrive.

Appendix 1 - UK market

RPA software vendors

blueprism® World's Leading Provider of RPA software with over 150 clients to date.

- Offices in the UK (London HQ), USA, Australia, India and Japan
- Total headcount c. 110, 50% UK based
- LSE-listed and backed by Schroders, River & Mercantile, and Old Mutual, while management retains a substantial shareholding
- Gartner 'Cool Vendor'
- Client include O2, Aegon and Siemens
- Large network of partners including Deloitte, Accenture, Alsbridge, Burnie Group, Cognizant, Digital Workforce, Genfour, HCL, HPE, Hexaware, IBM, ID Management, IEG4, Martin Jenkins (Quanton), NEOOPS, Numero, Reveal Group, RPAi, Solai & Cameron Technologies, Sopra Steria, Symphony Ventures, Thoughtonomy, VANAD Enovation and Virtual Operations

Alastair Bathgate, CEO

Alastair Bathgate worked in the enterprise software field since 1996, before which he spent a decade in various management positions at a leading bank. This has given Alastair a unique understanding of operational business processes and how technology can be used to improve efficiency and service. He co-founded Blue Prism in 2001 and has been CEO since.

Neil Wright, Director of Professional Services

Neil has been Head of Professional Services at Blue Prism since 2008 and recognised as a leading figure in the delivery of RPA implementation projects having successfully led the creation of Blue Prism delivery and support capabilities with major institutions from across the globe. Before joining Blue Prism, Neil had over 20 years' experience in the successful delivery of enterprise software to both the public sector and Blue Chip companies such as Lloyds Banking Group, Barclays Bank and Royal Bank of Scotland.

Martin Flood, VP Global Sales

Martin Flood brings Sales & Sales Management expertise and experience, gained in the IT Industry over two decades in a variety of enterprise software and hardware businesses. Martin's roles have ranged from large international organisations such as Sybase and Sun Microsystems through to early stage software companies such as Whitelight Systems and Searchspace. Martin recently headed the new products division of Progress Software EMEA which comprised SOA Integration, Business Activity Monitoring and Business Process Management offerings.

UiPath
Robotic Process Automation

Leading RPA vendor, providing a complete software platform to help global enterprises design, deploy and manage a full-fledged robotic workforce. The company helps businesses to automate repetitive functions like processing insurance claims.

- A challenger to Blue Prism and Automation Anywhere
- Romanian startup, UK HQ and offices in the US, India, Singapore and Japan
- Raised $30 million in a Series A round of funding led by Accel in 2017
- Selected as RPA Technology Leader by Forrester and Everest in 2017
- Headcount c.100, majority based in Romania
- Leadership team: Daniel Dines, CEO. Kulpreet Singh, MD (EMEA & APAC) and three senior sales executives; Ian McGregor, Kedar Dani and Tobias Rataj from the BPO and IT sectors joined the London team in 2016. Guy Kirkwood is COO
- 200 global clients including Lufthansa, Generali, Telenor, Dong Energy and the BBC
- Verticals include Banking/FS; Insurance; Manufacturing; Utilities; Healthcare and Government
- Large network of partners, some 150 companies that help sell and implement its services including Accenture, Deloitte and Capgemini

Software as a Service (SaaS) platform, combining Enterprise RPA and complementary technologies to deliver automation across front and back office activities (using Blue Prism robotic software platform for organisations worldwide).

- London HQ
- Headcount c. 25, predominantly UK based
- Terry Walby, CEO; Dean Chapman, CCO
- "Most visionary" RPA market leader in Everest Group's independent report
- Thoughtonomy work with leading service providers, integrators, outsourcers and enterprise clients globally. Recently signed a global agreement with Fujitsu, adding RPA to their suite of tools

Adetiq is the UK-based provider of secure document and data process outsourcing (DPO), Robotic Process Automation (RPA) & Business-Process-as-a-Service (BPaaS).

- 2.6M GBP turnover, headcount c. 25
- Brighton, UK HQ
- Established for over 45 years, Adetiq was an early adopter of RPA technology
- Peter Repp, CEO; and Michael Hill, COO
- Adetiq's client base consists of multi-national organisations, spanning a range of verticals including financial services, retail and leisure, healthcare, utilities, local and central government, telco's and transportation

RPA Advisors

Helping companies assess, design, implement and manage intelligent process automation across their business. Acquired by Accenture in 2017.

- Founded in 2012 and leveraging Blue Prism Software the business offers a range of automation solutions, including RPA, cognitive technologies, and desktop automation
- Newport Wales HQ, London Office
- Headcount c.50, split between London and Cardiff/Newport, and now part of Accenture's Automation Center of Excellence team in the UK
- Founder & CEO, James Hall

Independent consulting provider of automation consulting and design, implementation and developer training services.

- London office
- Headcount c.10 across both US and Europe.

Appendix 2 - Global Market

RPA software vendors

Automation Anywhere is the global leader in enterprise Robotic Process Automation, delivering a comprehensive enterprise-grade RPA platform with built-in cognitive solutions and analytics.

- HQ in San Jose, US, and offices in key markets such as London, Mumbai, Melbourne and Bangalore
- Headcount c. 475 (majority across the US and India)
- Key people include Mihir Shukla, CEO and Shail Khiyara, CMO. James Dening, VP Europe is responsible for all European revenue
- Over 500 of the world's largest brands use the platform including LinkedIn, Societe Generale, McDonald's, Santander Bank (Norway), Santander Consumer Finance (Finland)
- Announced a partnership with KPMG UK to expand service delivery to European-based enterprises in 2017

RPA and integration platform that acquires, enhances, and delivers information from virtually any application or data source, including websites and portals, desktop applications, and enterprise systems, without coding.

- More than 25,000 customers in financial services, insurance, government, healthcare, higher education, supply chain, business process outsourcing and other markets
- Kofax markets its solutions via a direct sales and service organization, along with a global network of more than 1,000 authorized partners in more than 70 countries throughout the Americas, EMEA and Asia Pacific

REDWOOD Robotise all processes within R2R, O2C, P2P (financial planning) and those within Human Capital and the Supply Chain.

- Netherlands HQ, with additional offices in the US, the UK, France, Australia, and Germany
- Named as a 'Strong Performer' in Forrester Research's 2017 RPA report
- Headcount c. 200 across the Netherlands, US, and UK
- 3,000 customers worldwide use Redwood's solutions to automate their business processes including Heineken, Virgin Money, GSK and UBS
- Redwood has strategic partnerships with SAP, IBM, Deloitte Consulting LLP, and HP

WorkFusion WorkFusion's Intelligent Automation enables enterprise operations to digitize. WorkFusion combines AI-powered capabilities that global businesses need to digitize into enterprise-grade products purpose-built for operations professionals. Operations teams at data-intensive organizations, such as global banking and financial services companies, healthcare and insurance providers, and BPO firms use WorkFusion Intelligent Automation to become leaner, more productive and agile.

- New York HQ with offices Eastern Europe
- Headcount c. 120 (split evenly across the US and Belarus)
- Raised $35 Million in 2017, led by Georgian Partners, investment to drive global growth and accelerate customer adoption of AI products as RPA scales, bringing total funds raised to $71 million
- WorkFusion RPA Express is the world's first free RPA product for enterprise operations, launched globally, making it faster and easier for businesses to begin or accelerate their digitization efforts - over 2000 users from 850 companies have participated in WorkFusion RPA Express since February 2016
- WorkFusion named "Cool Vendor in Smart Machines" by Gartner in 2016

OpenSpan, now Pegasystems, provides robotic automation and workforce intelligence solutions for the enterprises in the US and internationally. Acquired by Pegasystems in 2016.

- US HQ
- Headcount c. 80 predominantly US - before their acquisition, OpenSpan dissolved the EMEA team as most of their customers were US based
- Serving Fortune 500 and Forbes Global 2000 companies, including banking and financial service, government, travel and hospitality, transportation and logistics, insurance, retail and technology, and telecommunication industries

Operational intelligence and robotic process automation.

- US HQ in Dallas, Texas
- Headcount c. 40
- One of the 20 Most Promising Robotics Solution Providers 2016 – CIO Review
- Announced the introduction of AutoiQ, the latest generation of its RPA solution

Kryon Systems provides real-time, in-application guidance and automation, helping companies and public organisations make sure users perform at the highest level, from the first time, every time. Leo (Learn Evolve Operate), the company flagship solution, can be thought of as an advanced, robotized version of the 'Microsoft paperclip.'

- Harel Tayeb announced as the new CEO, taking over from Bibi Rosenbach who successfully led Kryon Systems from early stage start-up to become a disruptive force in the market
- Headcount c. 30 split across the US and Israel
- US HQ, EMEA office located in Israel

ENABLESOFT

Provider of RPA software for banks, healthcare and other organisations. The EnableSoft team develops and markets 'Foxtrot' software that eliminates manual data processes by behaving, deciding, and working just like a person.

- Florida, US HQ

- Headcount c. 25 (primarily US)

- Serving over 500 corporate clients worldwide

- Formed a strategic partnership in 2017 with Denmark-based Consulting firm Basico to offer Foxtrot RPA to its clients in Denmark and abroad

- Partnership with Dekker EDV-Beratung GmbH, a German-based distributor, formally introducing EnableSoft to the European marketplace

softomotive

Robotic Process Automation technology provider.

- HQ in Greece and seeking to expand their USA presence by recruiting Software Developers based in Houston or Tampa.

- "Star Performer" in the Everest Group's 2016 Robotic Process Automation (RPA) - Technology Vendor Landscape – having recognised Softomotive's shift to pure enterprise automation with ProcessRobot, a product with scalability, capacity management, enterprise-level security, escalation management, compliance with standards and advanced debugging, as a key attribute to the company's success

- Headcount c. 15

- Trusted by more than 6,000 companies worldwide

RPA Advisors

- AVO Consulting (Norway)

- The Burnie Group (Canada)

- Digital Workforce (Finland)

- RPAi (North America)

- Symphony Ventures (US, UK, and Poland)

- VANAD Group (Netherlands)

- Vector ITC Group (Spain, UK, Latam and US)

- Solai & Cameron Technologies (US)

- id.mngmnt (Norway)

- Neoops(Czech Republic)

Global Consulting/Advisory Firms supporting RPA

- Deloitte

- PwC

- KPMG

- EY

- Accenture

- Alsbridge (acquired by ISG)

- Virtusa

Corporate players supporting RPA

- Infosys

- Verint

- Xerox (ClearSight)

- Sopra Steria

- Capgemini

- Cognizant

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