

RPA Migration in 2023

The reasons, benefits, challenges, and logistics of migrating RPA estates to new automation platforms

blueprint[®]

Key Statistics

58%

of organizations are considering, in the process of, or have already migrated their RPA estates to a new RPA platform

Reducing expensive licensing fees was the most cited reason for switching RPA platforms by organizations that have already migrated their RPA estates

\$500,000 is the average budget companies are allocating for RPA migrations

71% of companies considering RPA migration plan to do so by procuring an RPA migration solution

IT is the department driving the demand for RPA migration

10 months

is the average timeline companies expect to complete their RPA migrations in

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01

OVERVIEW

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About this Research

RPA (Robotic Process Automation) adoption has accelerated and scaled considerably since its inception. Organizations were eager to realize the cost-reduction and increases in efficiency that RPA promised. However, as their RPA estates (the automations they have in production) have grown, so has the total cost of ownership for automation, the maintenance issues, and the complexity of designing and delivering automated processes.

To reduce the total cost of ownership and simplify automation delivery, organizations are rapidly migrating their RPA estates from the expensive, technically complex RPA platforms they started their automation journeys on, to simplified and more cost-effective RPA solutions.

This research report explores:

- ✓ The desire to migrate RPA estates to new automation platforms
- ✓ The reasons driving RPA migrations
- ✓ The expected and realized benefits of switching RPA solutions
- ✓ The challenges and logistics of RPA migrations.



Methodology

To examine the state of RPA migrations, Blueprint commissioned a survey of 500 Executives, Directors, Department Heads, Senior Managers, and Analysts from the United States, the United Kingdom, Canada, France, and Germany. The research was performed in February and March of 2023 using an email invitation and an online survey.

Those surveyed were from companies ranging from 1,000-10,000+ employees representing the following industries:

INDUSTRIES	
SOFTWARE/TECHNOLOGY	MANUFACTURING
FINANCIAL SERVICES	BANKING
HEALTHCARE/PHARMA/LIFE SCIENCES	RETAIL
TRANSPORTATION	ACCOUNTING
POWER/OIL & GAS/UTILITIES	EDUCATION
GOVERNMENT	INSURANCE
COMMUNICATIONS/MARKETING/ ADVERTISING	TELECOM
WHOLESALE TRADE	HOSPITALITY
REAL ESTATE	

This research was done in partnership with:  SAPIO RESEARCH

What is RPA Migration?

This research focuses on RPA migrations.

RPA migrations are where an organization moves their RPA estate (that is, all the automated processes they currently have in production) from one RPA platform into another.

RPA migrations have traditionally been very challenging, time-consuming, and expensive because the major RPA platforms specify process automations differently. An automated process in one RPA tool isn't necessarily compatible and operable in another RPA tool.

To migrate RPA estates, each automated process had to be investigated, understood, and then re-coded or re-built for the new, destination RPA platform by a highly skilled technical resource. There are now purpose-built technologies that dramatically take out the manual effort and large timelines for RPA migrations, however even with the traditional challenges of migrating RPA estates, the number of organizations looking to switch RPA platforms is increasing. This research was aimed to uncover why and how they're doing it.

02

THE DESIRE TO MIGRATE RPA ESTATES

- How many organizations are actually interested in migrating their RPA estates to a new RPA platform?



How Many Organizations are Actually Interested in Migrating their RPA Estates to a New RPA Platform?

One of the major objectives of this research was to gauge and measure the interest in the automation space for organizations looking to migrate their RPA estates onto another RPA platform.

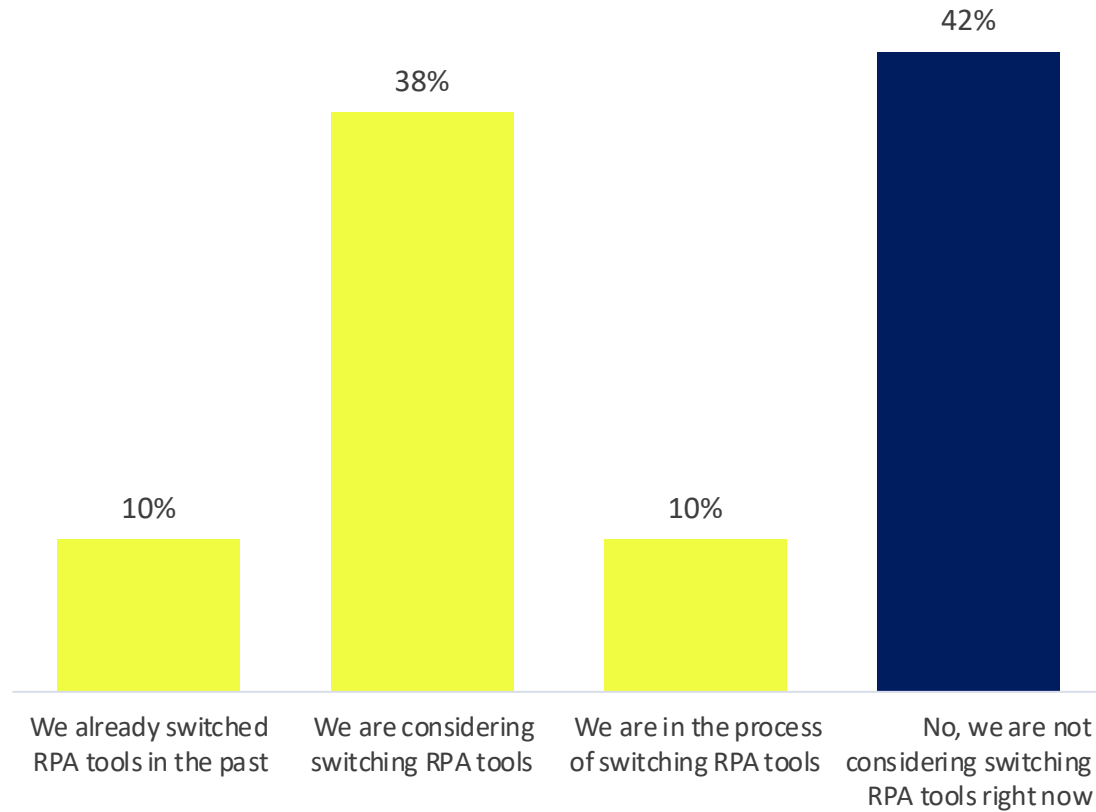
The findings indicate that there is a real and aggressive interest to migrate RPA estates to new RPA platforms. Out of the 500 respondents surveyed, more than half (58%) are either in the process of switching RPA tools, considering switching RPA platforms, or have already migrated their RPA estates to a different tool in the past.

Of the overwhelming majority that indicate a real interest in RPA migration or have completed it in the past:

- 38% are considering switching RPA platforms
- 10% are in the process of migrating their RPA estates
- 10% have already completed an RPA migration.

**38% of respondents
are considering
migrating their RPA
estates to new
automation platforms**

How Many Organizations are Actually Interested in Migrating their RPA Estates to a New RPA Platform?



How Many Organizations are Actually Interested in Migrating their RPA Estates to a New RPA Platform?

It's no surprise that the data suggests most organizations are considering migrating their RPA estate onto a new automation platform. RPA migrations are complex and challenging, and many organizations are still unaware that there are technical solutions that can do the bulk of the re-coding and migration work for them.

Another interesting point to note is that of the companies currently not considering switching RPA platforms, 85% of them are large-scale organizations with over 5,000 employees.

This suggests that a possible deterrent for RPA migration is organization size and the challenges associated with such major initiatives at large enterprises—which might include acquiring executive and employee buy-in or the uncertainty of maintaining continuity during such major changes. It could also suggest that companies are adding new RPA platforms to build net-new automations without completely migrating their practice onto one central, consolidated RPA platform.

Of the companies currently not considering switching RPA platforms, 85% of them are large-scale organizations with over 5,000 employees.

03

THE REASONS & BENEFITS BEHIND RPA MIGRATIONS

- What are the reasons driving RPA migrations?



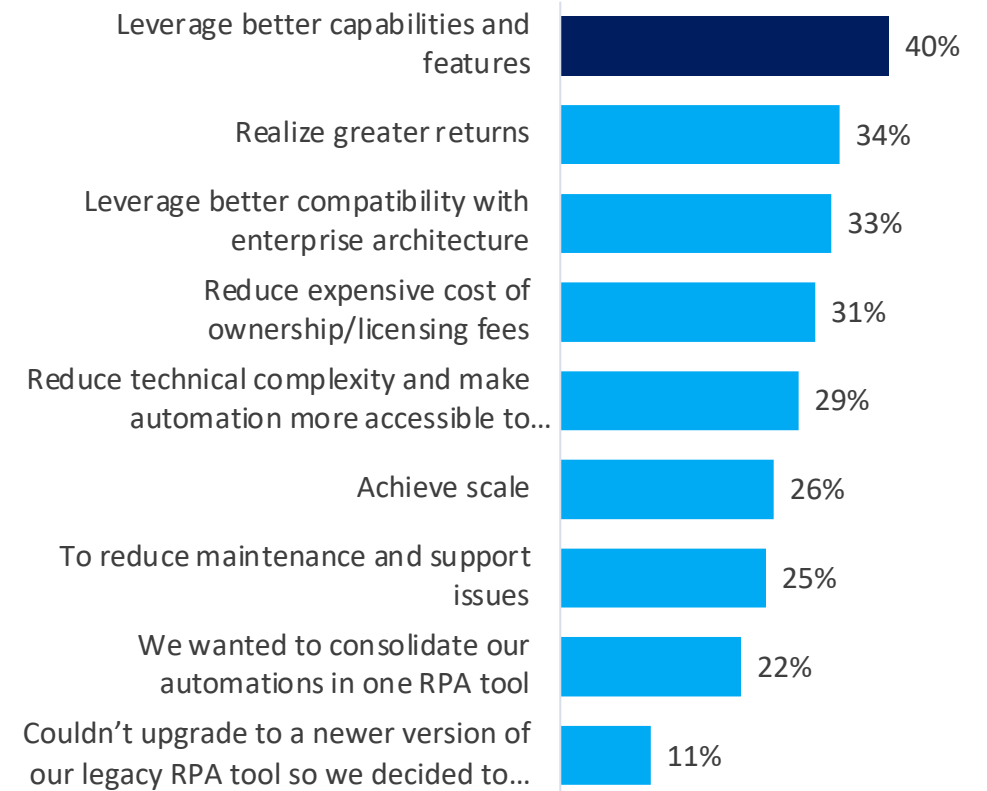
Reasons Driving RPA Migrations – Considering RPA Migration

There are a host of reasons organizations are so eager to migrate their RPA estates onto new RPA platforms. At a high-level, companies want to realize greater benefits that contribute to their bottom line—whether that be cost reduction or increasing returns by simplifying automation delivery for the average business user to achieve scale.

Those considering migrating their RPA estates are being motivated by a desire to:

- Leverage better capabilities (40%)
- Realize greater returns (34%)
- Leverage better compatibility with enterprise architecture (33%)
- Reduce the expensive cost of ownership/licensing fees for automation (31%)

What are the reasons that motivated your organization's interest in changing RPA vendors?

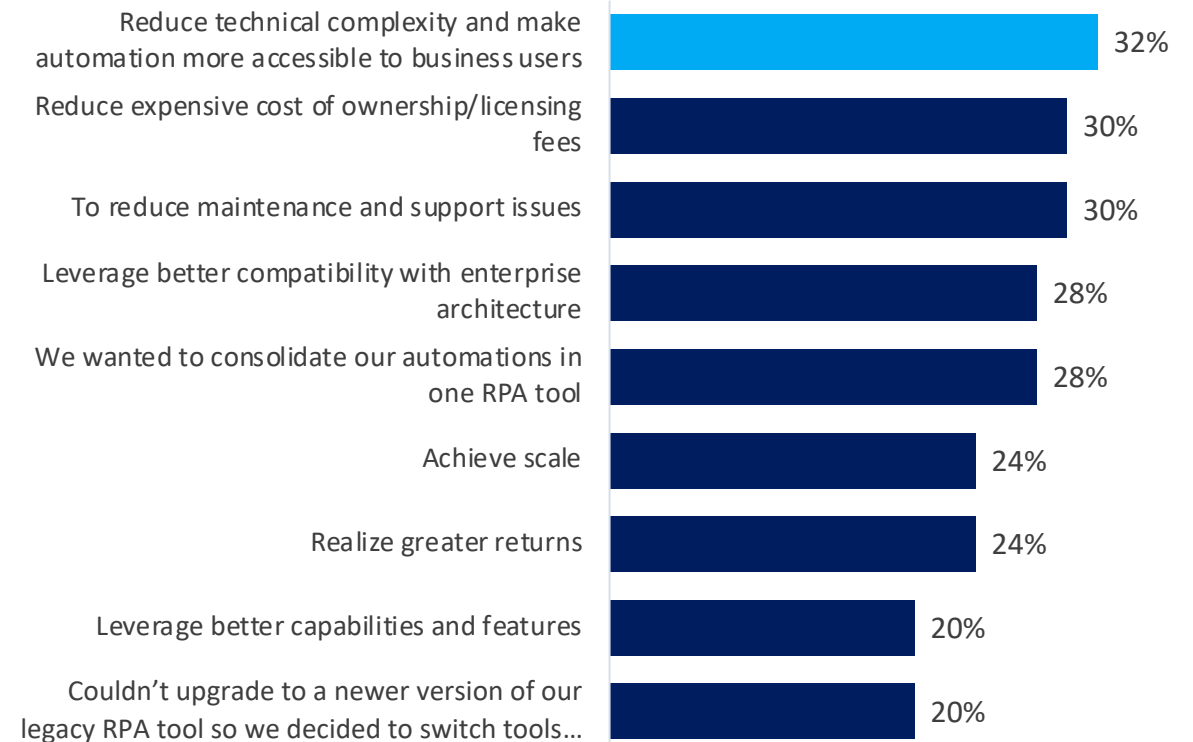


Reasons Driving RPA Migrations – In the Process of RPA Migration

The respondents that reported they are in the process of migrating their RPA estates to new automation platforms claimed they were most motivated by:

- Reducing technical complexity and making automation more accessible to business users (32%)
- Reducing the expensive cost of ownership/licensing fees (30%)
- Reducing maintenance and support issues (30%)
- Leveraging better compatibility with enterprise architecture (28%)

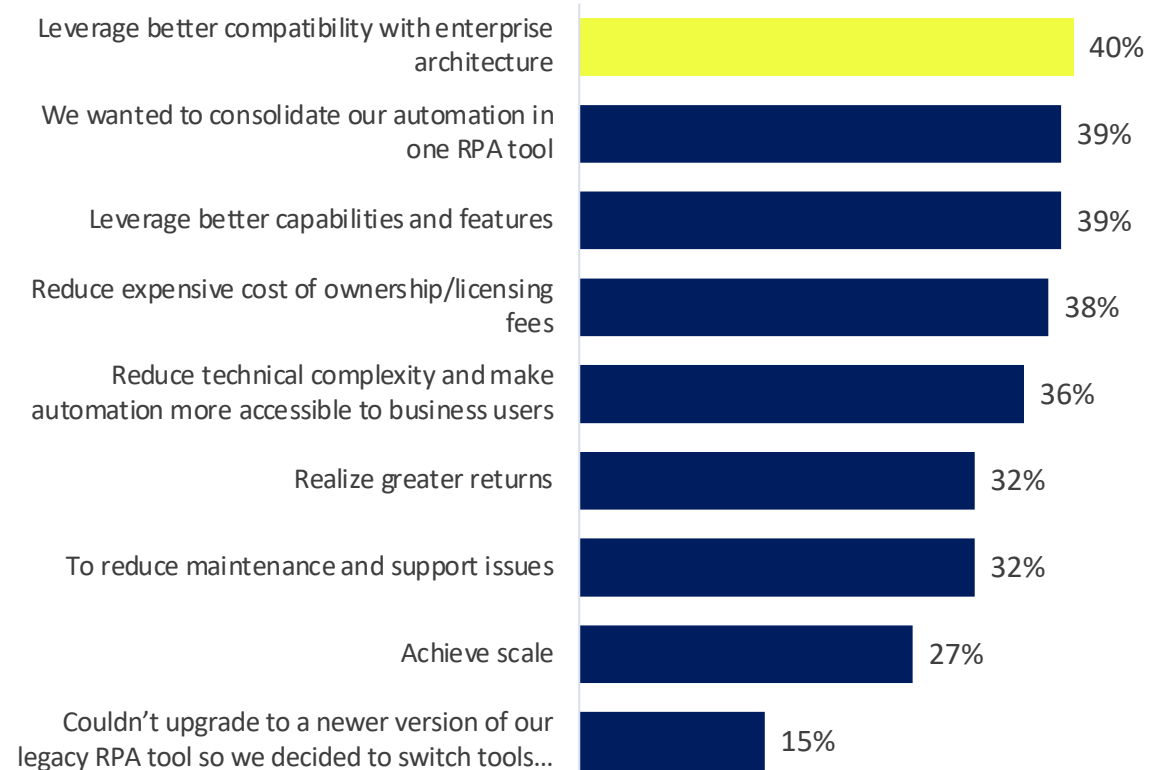
What are the reasons that motivated your organization's interest in changing RPA vendors?



Reasons Driving RPA Migrations – In the Process of RPA Migration

Comparing this with Blueprint’s 2022 research for RPA migration indicates that companies in the process of switching have prioritized reducing the technical complexity of automation delivery and maintenance reduction, however better compatibility with enterprise architecture and reducing licensing fees are still very much at the top of their wish-list.

Organizations in the process of RPA migration – 2022 data



Reasons Driving RPA Migrations – Already Switched RPA Tools

For the organizations that previously completed an RPA migration, what drove their demand to switch RPA providers was:

- Reducing the cost of ownership for automation/licensing fees (34%)
- Leveraging better capabilities and features (34%)
- Realizing greater returns (34%)
- Leveraging better capabilities with their enterprise infrastructure (32%)

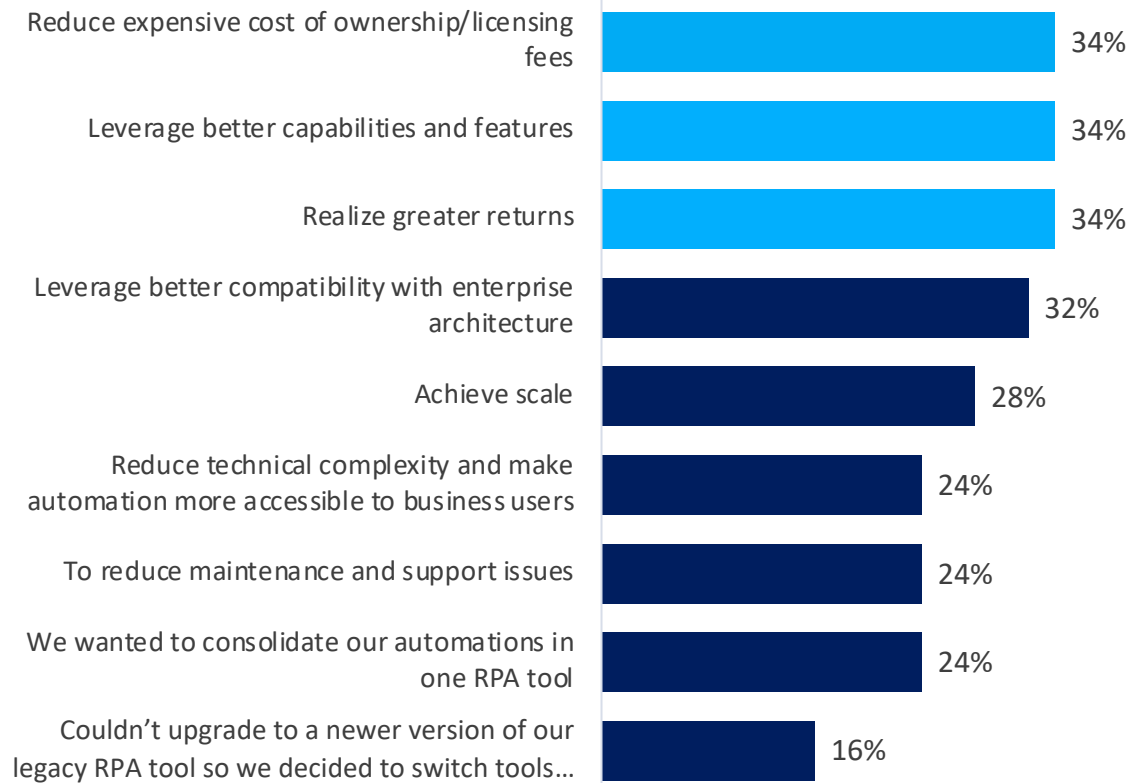
Comparing this year's findings with 2022's research in the same category indicates that automation's total cost of ownership has become a higher priority. This suggests increases in licensing fees from major RPA vendors has ignited the motivation to leave that provider altogether.

Leveraging better capabilities and features remains a prominent realized benefit for RPA migrations indicating that legacy RPA tools have been surpassed by RPA solutions with more robust and feature-rich offerings.

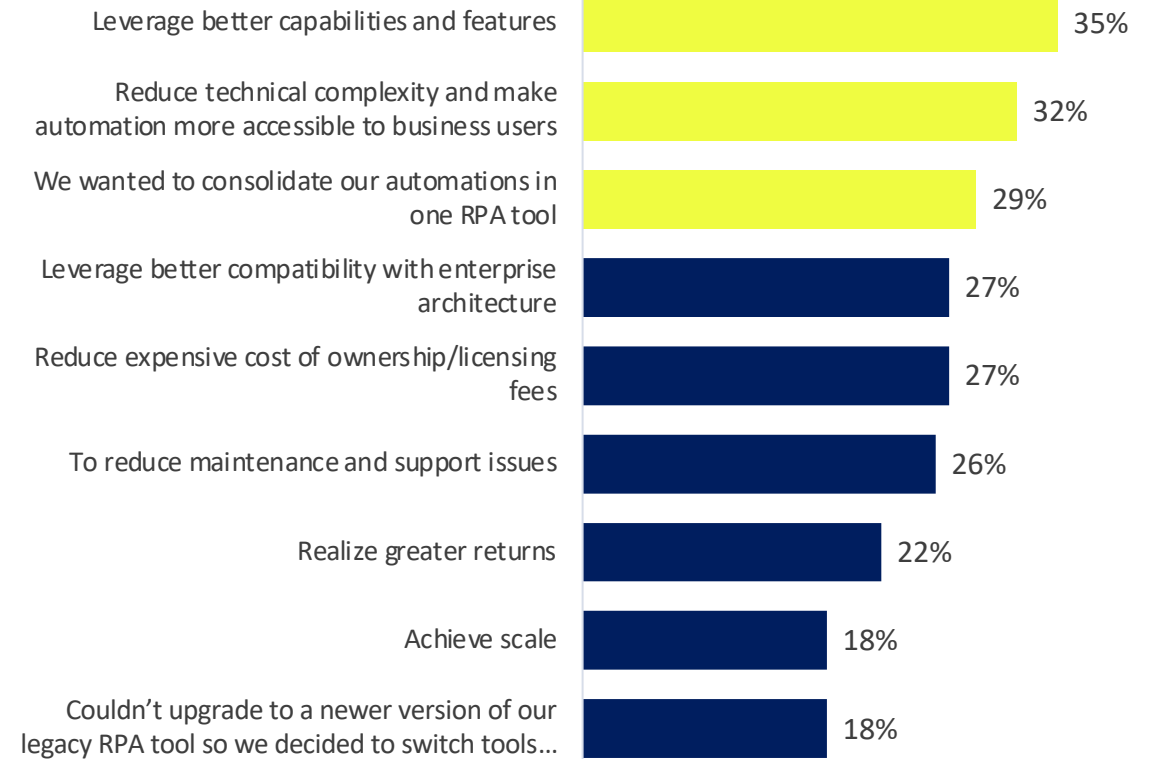
Automation's total cost of ownership has become a higher priority for organizations that have already migrated their RPA estates.

Reasons Driving RPA Migrations – Already Switched RPA Tools

2023



2022



Reasons Driving RPA Migrations

Regardless of where an organization is in their RPA migration journey, there is a common theme among all companies that are considering, in the process of, or have already completed an RPA migration. They all want better compatibility with their enterprise architecture and to reduce expensive licensing fees.

This could explain why Microsoft Power Automate receives most of the interest when organizations are investigating migrating their RPA estates to a next-generation intelligent automation platform: Power Automate delivers much more cost-effective pricing models that significantly reduces automation's total cost of ownership and facilitates seamless automation with other Microsoft products in a company's enterprise architecture, while offering built-in connectors for other applications and services.

All organizations want better compatibility with their enterprise architecture and to reduce expensive licensing fees.

04

THE DRIVERS & SPONSORS OF RPA MIGRATION

- The drivers of RPA migrations
- The sponsors of RPA migrations
- 2022 comparisons



The Drivers & Sponsors of RPA Migration

Automation is owned by different departments depending on the organization. The department that owns RPA operations, may not always be the one that manages the budget for automation and can approve an RPA migration to a new platform.

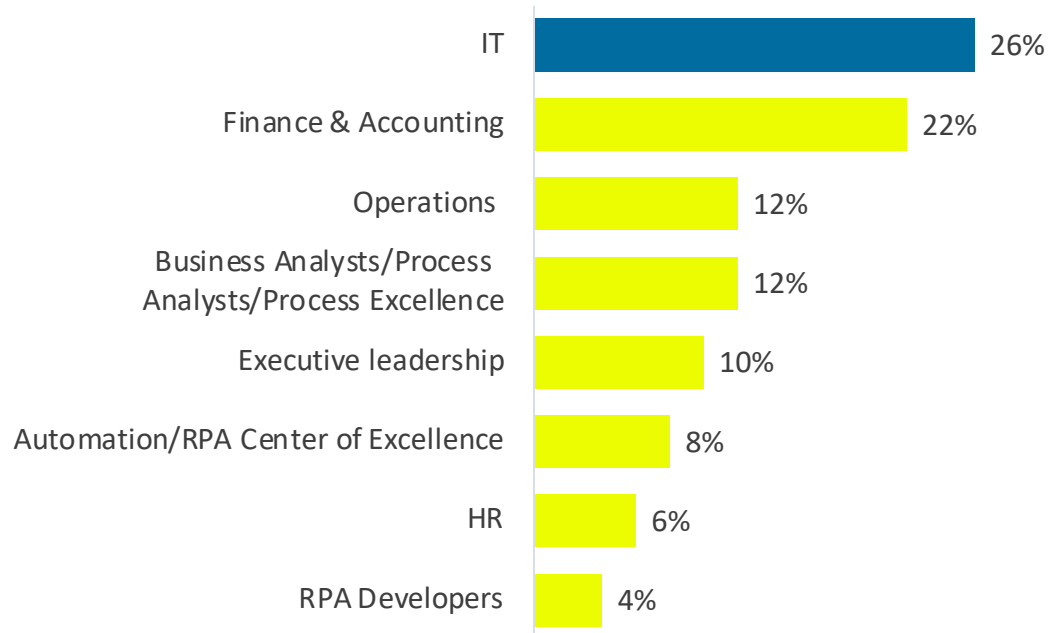
It's therefore interesting to investigate which department drives the demand to migrate RPA estates to new RPA platforms and who sponsors that move.

For organizations that have already migrated their RPA estates to a new automation platform, it was predominantly IT that drove the demand and the executive leadership that sponsored the decision.

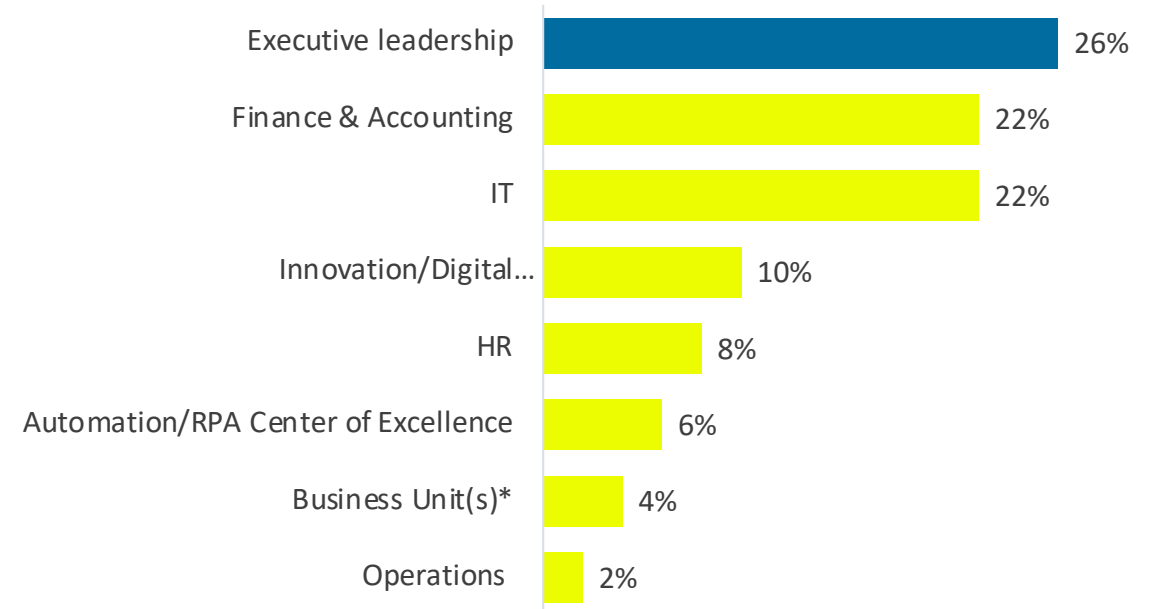
The Drivers & Sponsors of RPA Migration - Already Switched RPA Tools

For organizations that have already migrated their RPA estates to a new automation platform, it was predominantly IT that drove the demand and the executive leadership that sponsored the decision. With that being said, there is not much variance in the data from 2022 as Finance & Accounting was also a major driver, and both IT and Finance & Accounting were also prominent sponsors in RPA migration.

Drivers



Sponsors



The Drivers & Sponsors of RPA Migration

In 2022's research results, IT was also a major driver for RPA migrations indicating there hasn't been much of a shift there. This is a logical phenomenon considering that IT is perennially tasked with finding better, more cost-effective technical solutions in the marketplace.

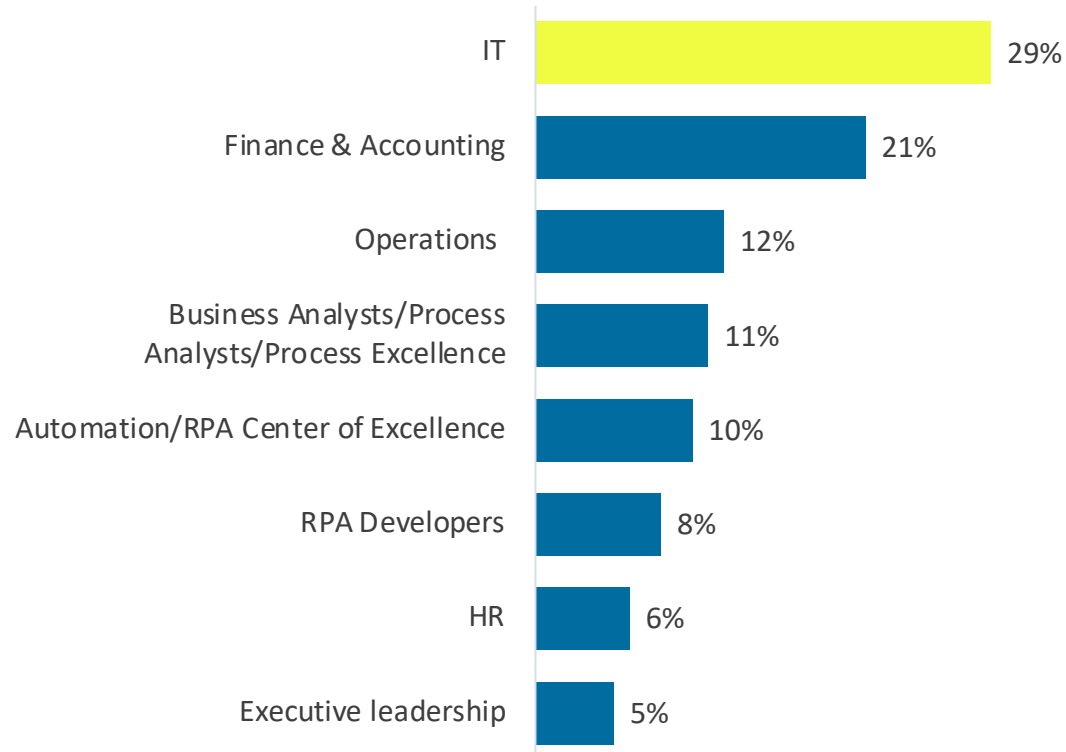
Their understanding of the technical capabilities of emerging next-generation intelligent automation platforms that could reduce the dependence on IT resources for automation delivery also makes them well-positioned to drive the shift to more simplified RPA platforms with better features and capabilities.

Executive sponsorship for RPA migration has made a significant leap from 2022 to 2023, however Finance & Accounting and IT remain prominent sponsors. The threat of an impending recession could account for this as executives have been tasked with aggressive cost reduction to mitigate a contracting economy. This might indicate heavier involvement in RPA migrations as organizations look to move to platforms that significantly reduce licensing fees and operational expenses overall.

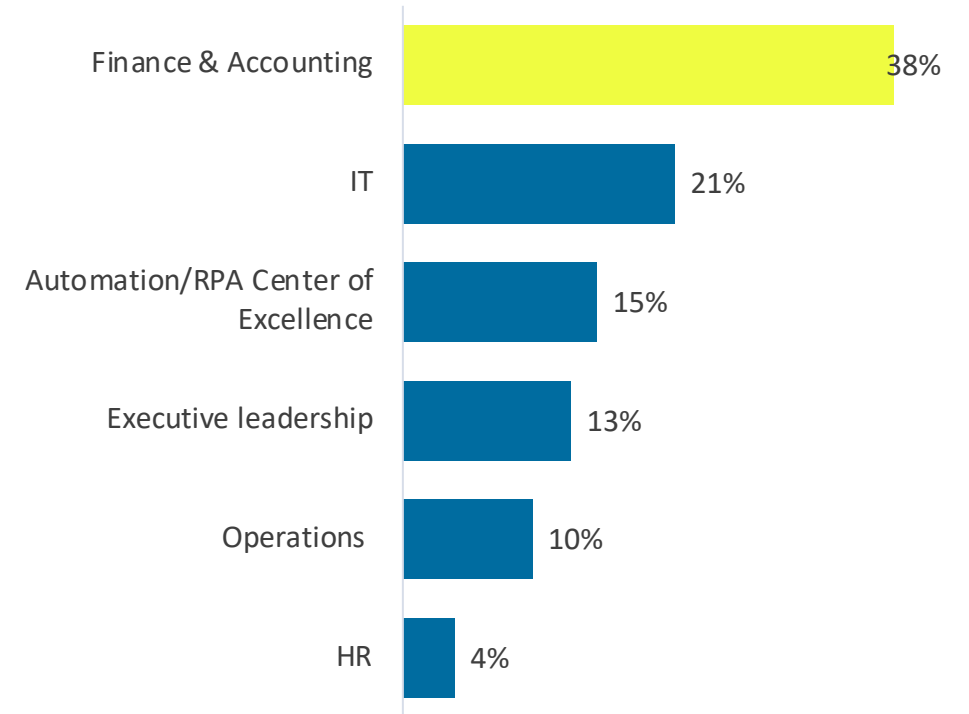
Executive sponsorship for RPA migration has made a significant leap from 2022 to 2023, however Finance & Accounting and IT remain prominent sponsors.

The Drivers & Sponsors of RPA Migration - Already Switched RPA Tools

2022 Drivers



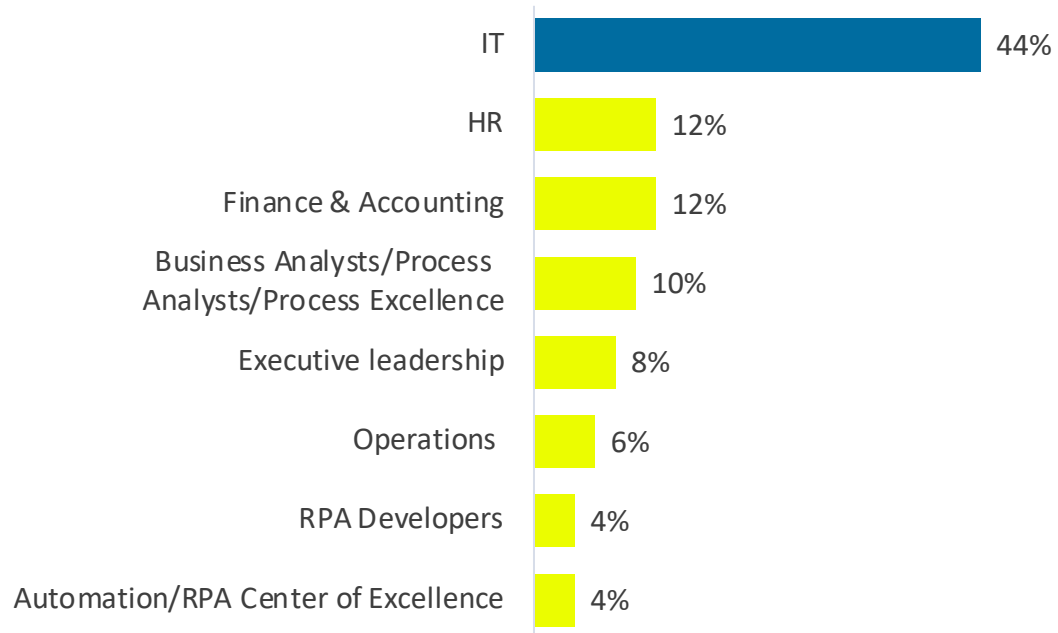
2022 Sponsors



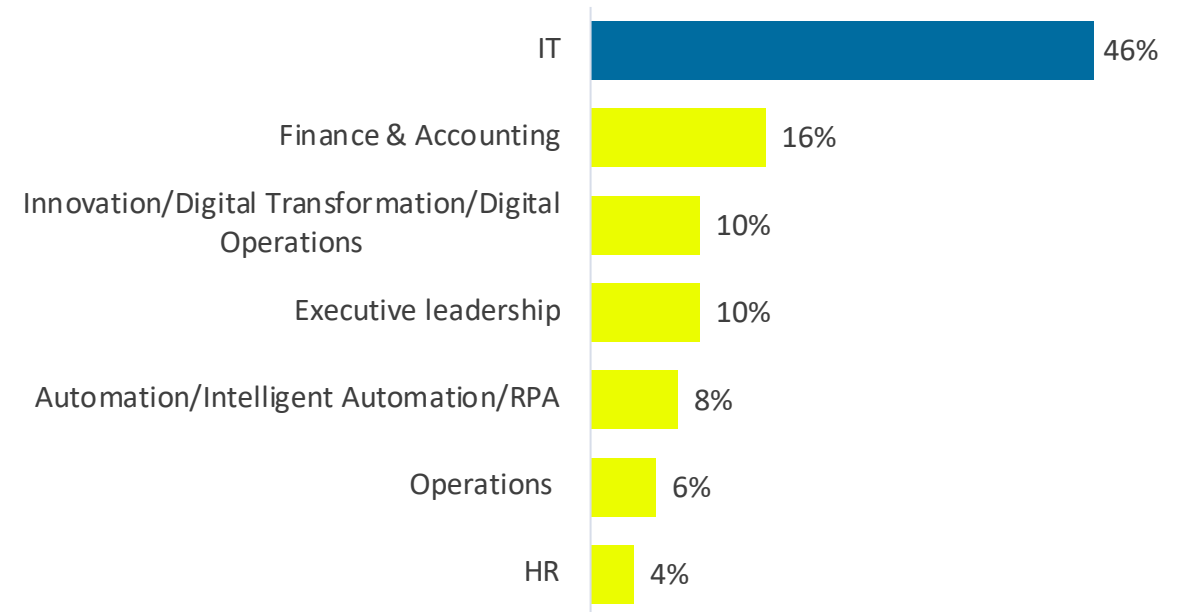
The Drivers & Sponsors of RPA Migration - In the Process of Switching

For organizations that are in the process of migrating their RPA estates to a new tool, IT was overwhelmingly both the main driver for RPA migration and the sponsor.

Drivers



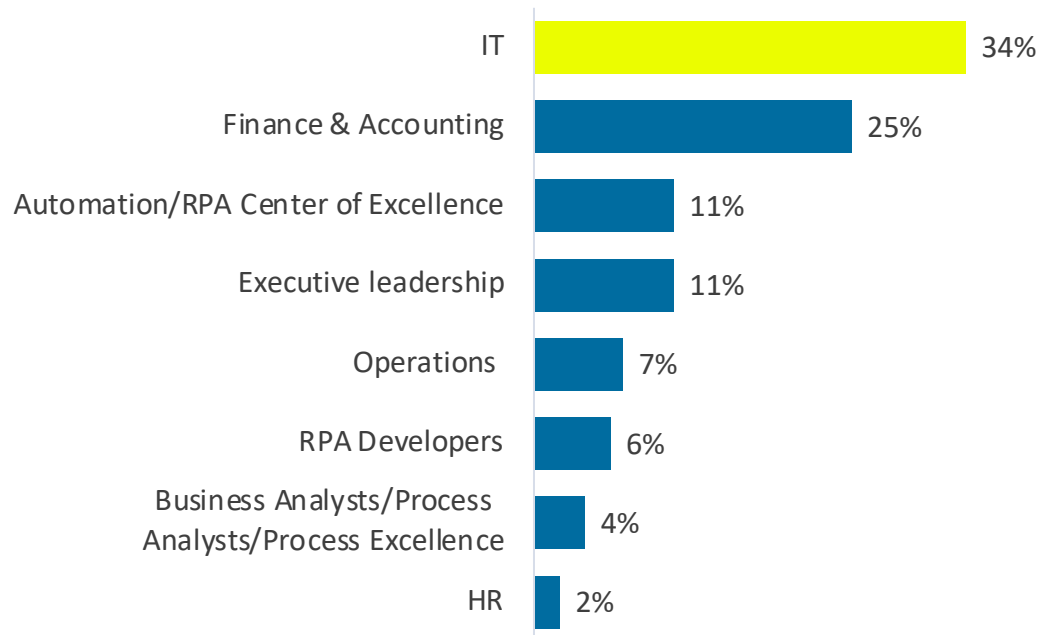
Sponsors



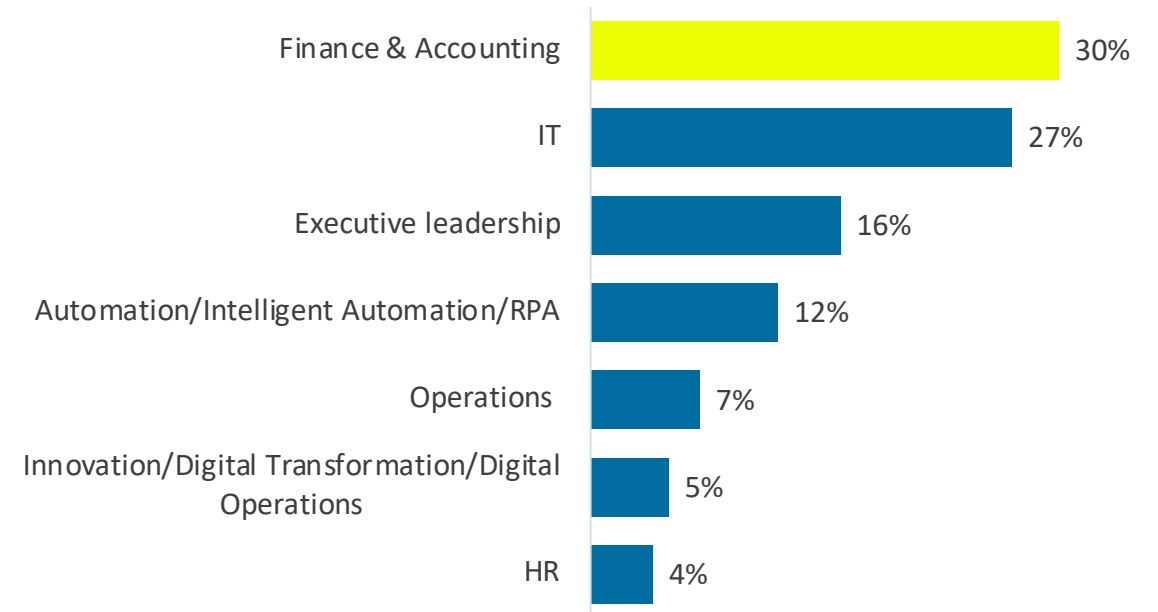
The Drivers & Sponsors of RPA Migration - In the Process of Switching

This is also consistent with previous research that supports IT as a focal driver for RPA migrations in progress, with a slight jump in involvement in 2023, particularly where sponsorship is concerned.

2022 Drivers



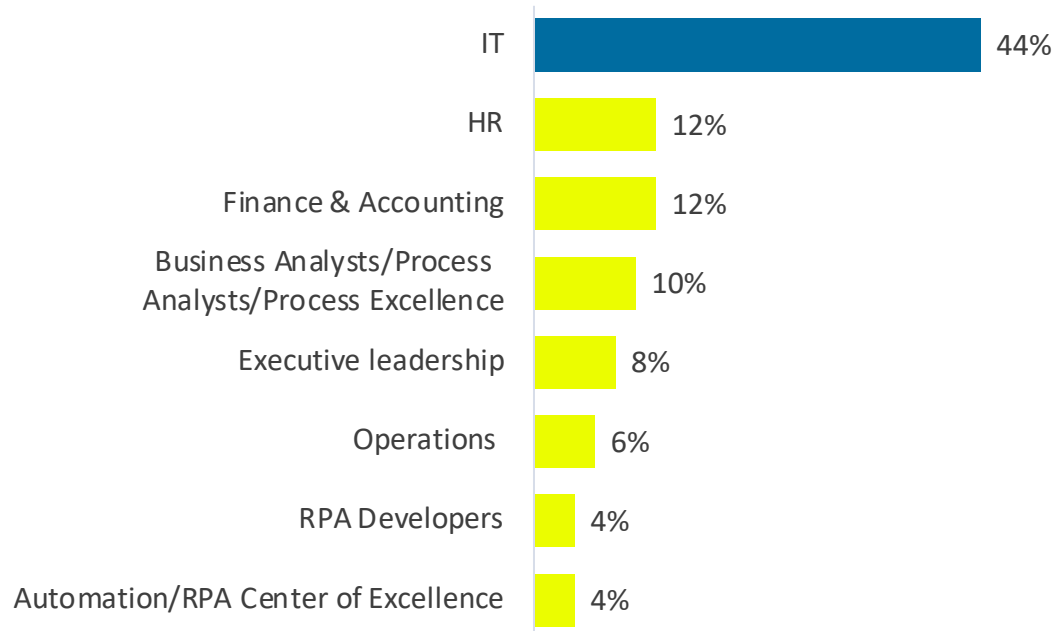
2022 Sponsors



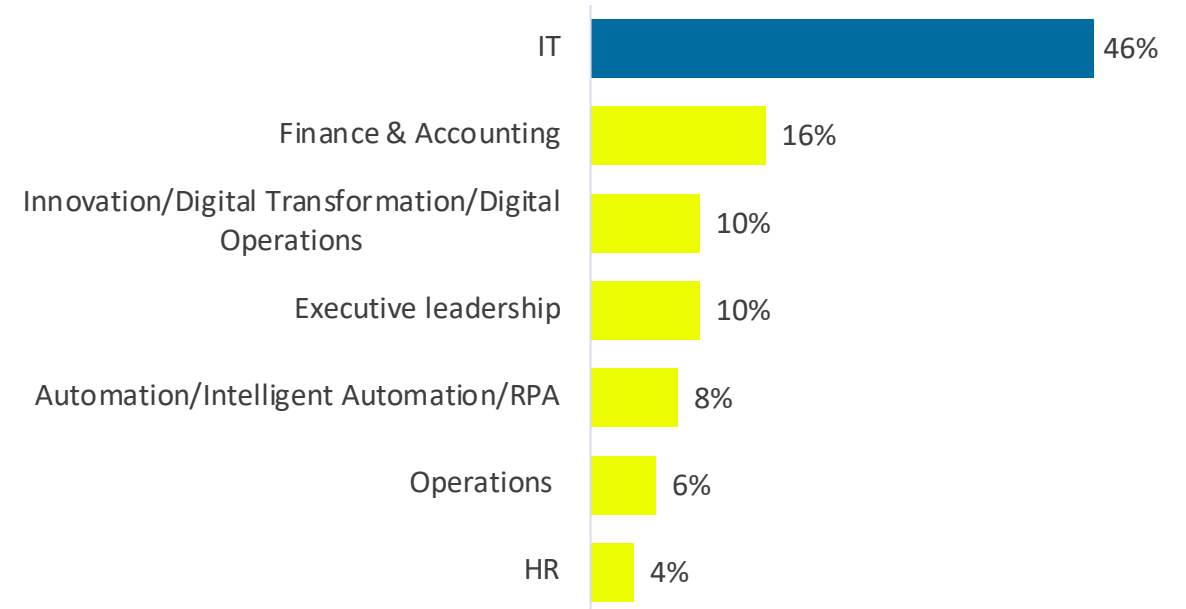
The Drivers & Sponsors of RPA Migration – Considering RPA Migration

Organizations that are considering migrating their RPA estates to new RPA platforms report that IT is both the main driver and sponsor, however the executive leadership is heavily involved as well.

Drivers



Sponsors



05

THE LOGISTICS & BUDGETS FOR RPA MIGRATION

- RPA estate sizes for migration
- RPA migration project timelines
- RPA migration budgets
- RPA migration execution strategies

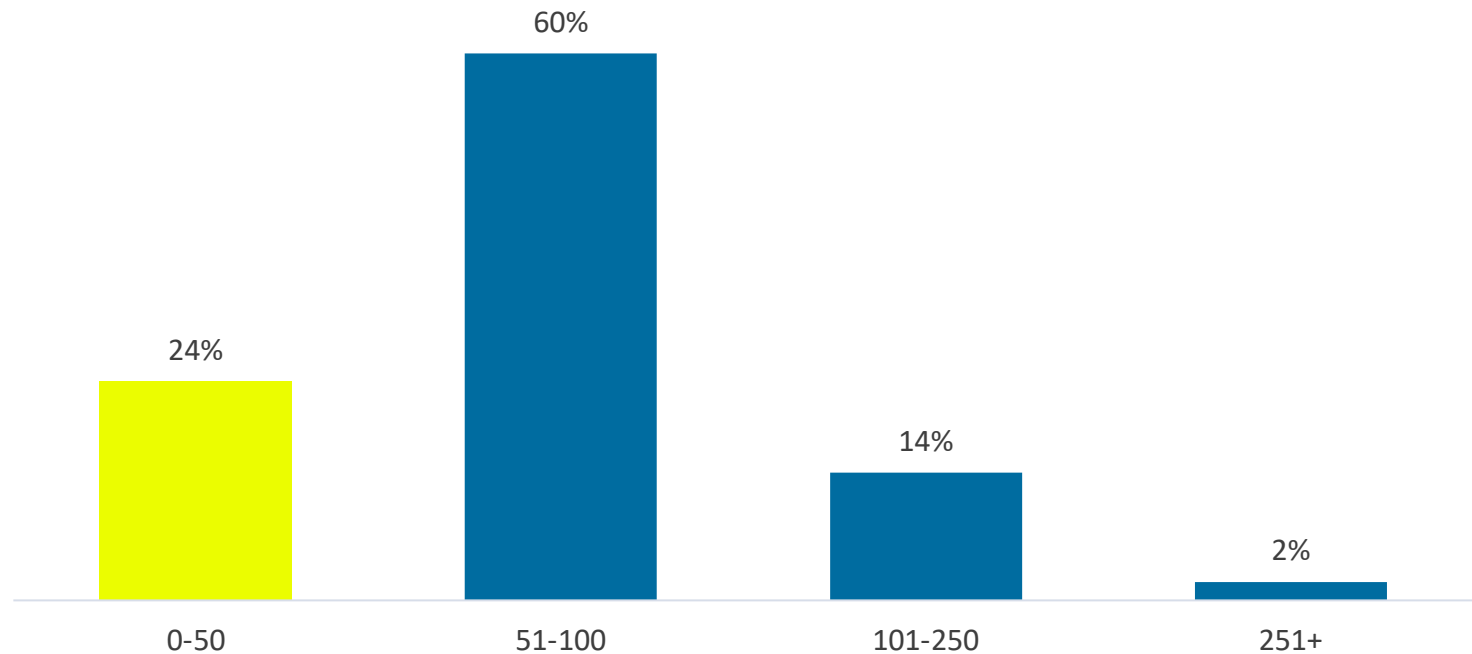


RPA Estate Sizes for Migration - Already Switched RPA Tools

In 2022, organizations that had already performed an RPA migration or were in the process of one, migrated an average of roughly 120 automations into their new, destination RPA platform.

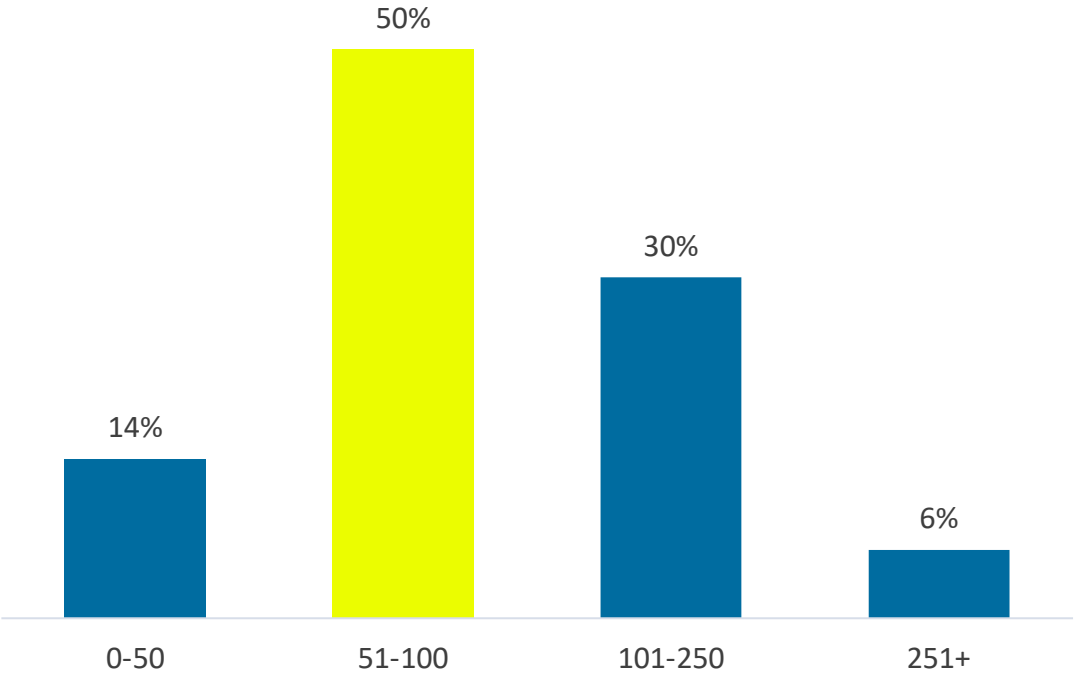
In 2023, there has been somewhat of a decrease. Companies that have previously made a switch to another RPA provider migrated an average of 73 automations.

**On average,
organizations who
previously switched
RPA tools migrated
around 73
automated
processes into their
new tool**

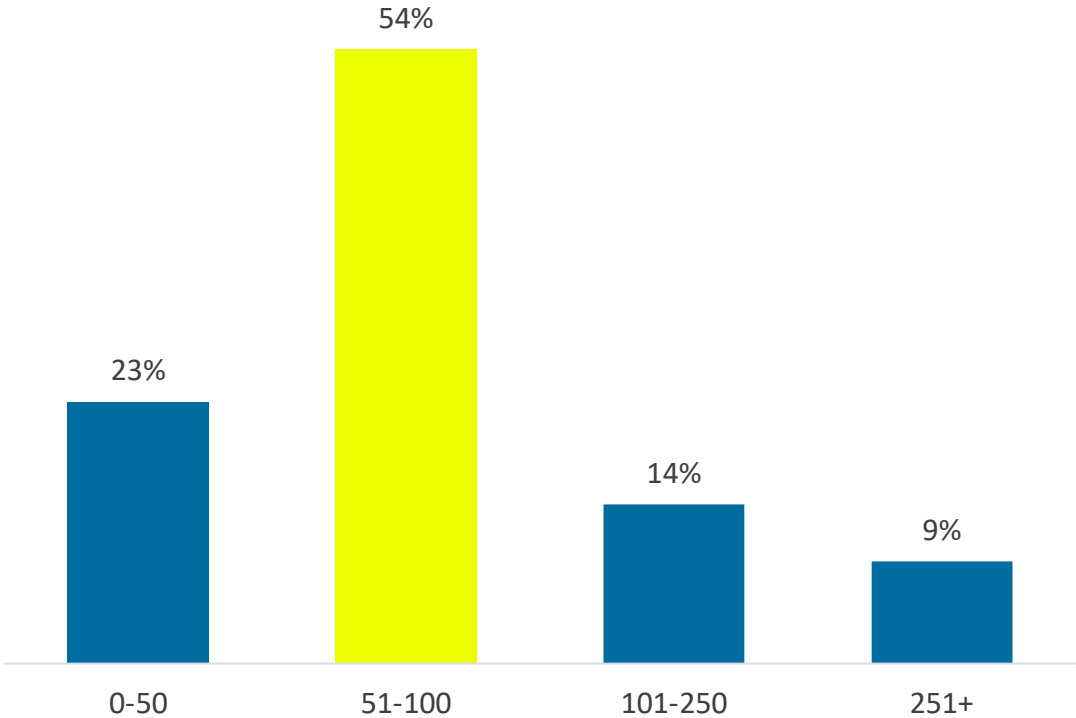


RPA Estate Sizes for Migration - In the Process of and Considering RPA Migration

Organizations in the process of migrating RPA platforms are planning on migrating an average of 87 automated processes.



And those considering an RPA migration have their sights set on migrating an average of 76 automations.

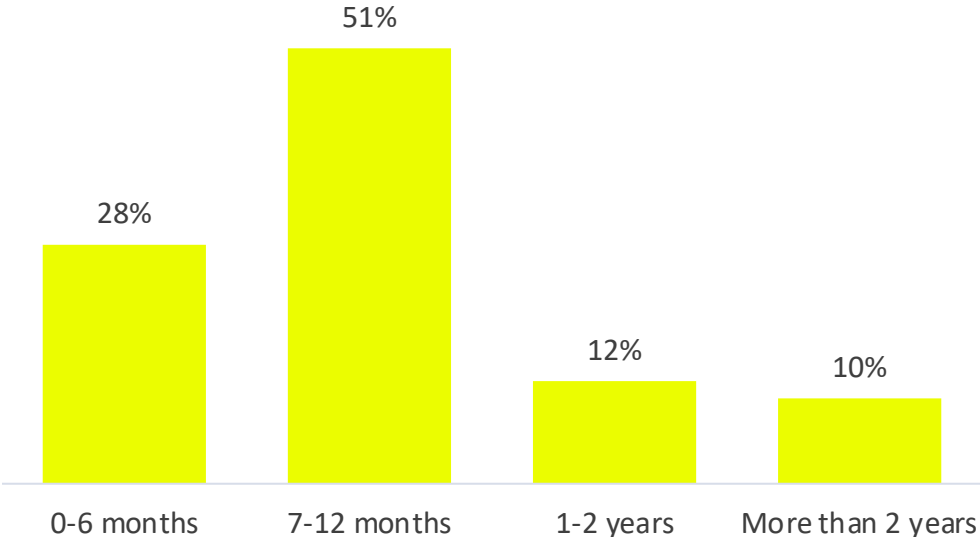


Even with the slight variation over the course of a year, the majority of RPA estates anywhere along the RPA migration spectrum typically falls in the 51-100 automation estate size.

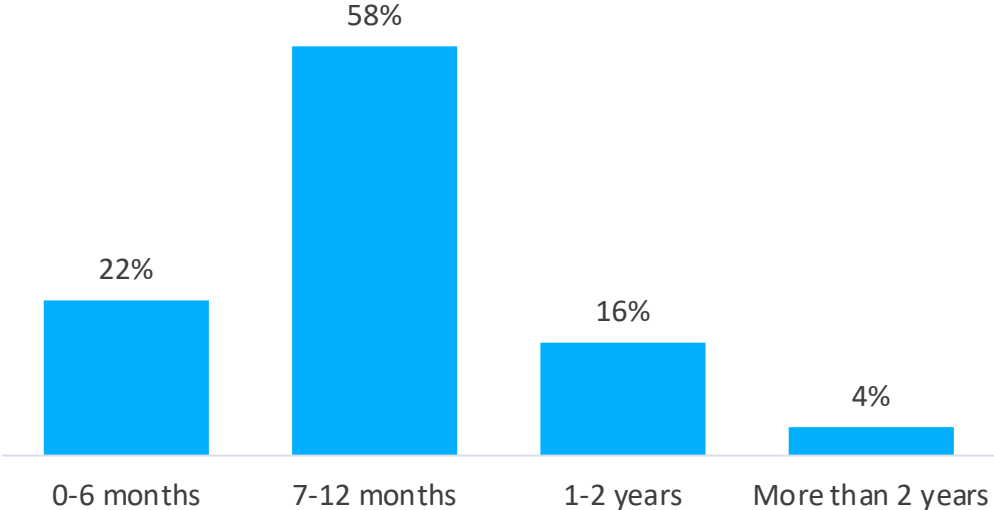
RPA Migration Project Timelines

In 2022, the average length of an RPA migration project for those that had already made a switch was 10 months. For organizations in the process of switching RPA providers, they anticipated the project would take 7-12 months to complete.

Organizations who have already switched RPA tools in 2022



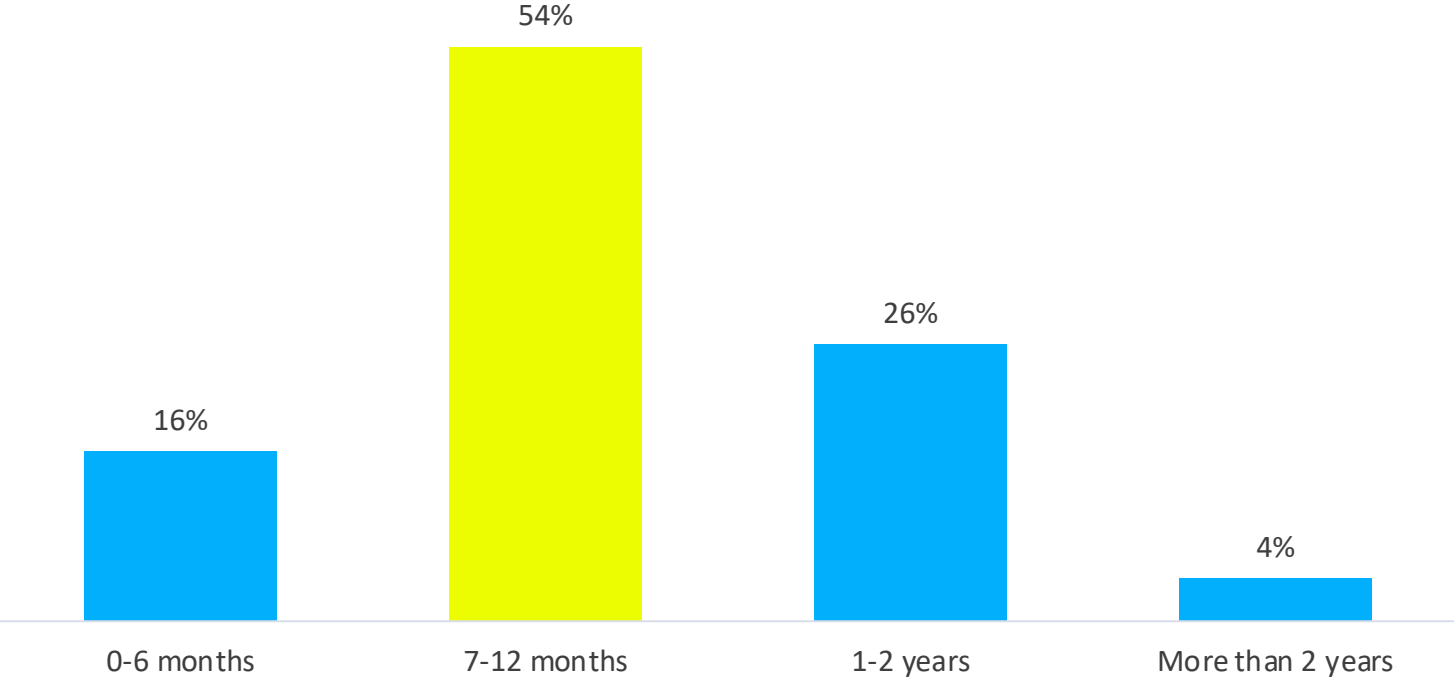
Organizations in the process of switching in 2022



RPA Migration Project Timelines - Already Switched RPA Tools

In 2023, those figures remain consistent. Companies who had previously completed an RPA migration took 11 months to complete the switch.

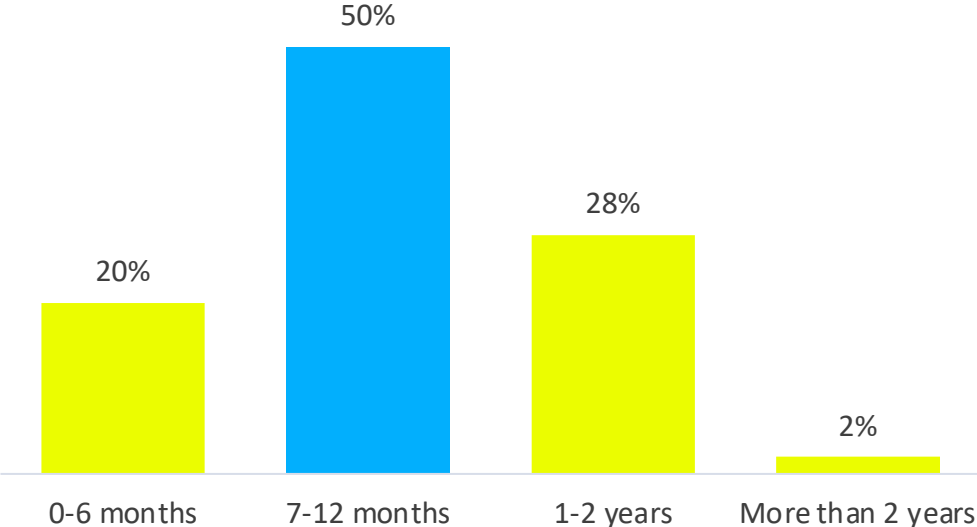
On average, organizations who previously switched RPA tools took 11 months to complete the migration of their RPA estates.



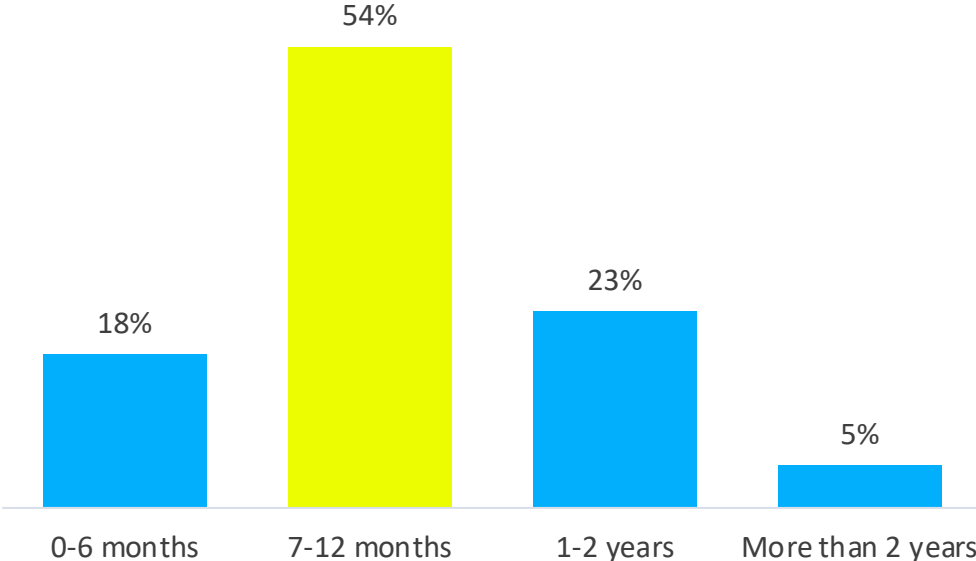
RPA Migration Project Timelines - In the Process of and Considering Switching

Those in the process of completing an RPA migration expected to complete their switch in 7-12 months and those considering migration anticipated the same length to achieve their move.

In the process of an RPA Migration



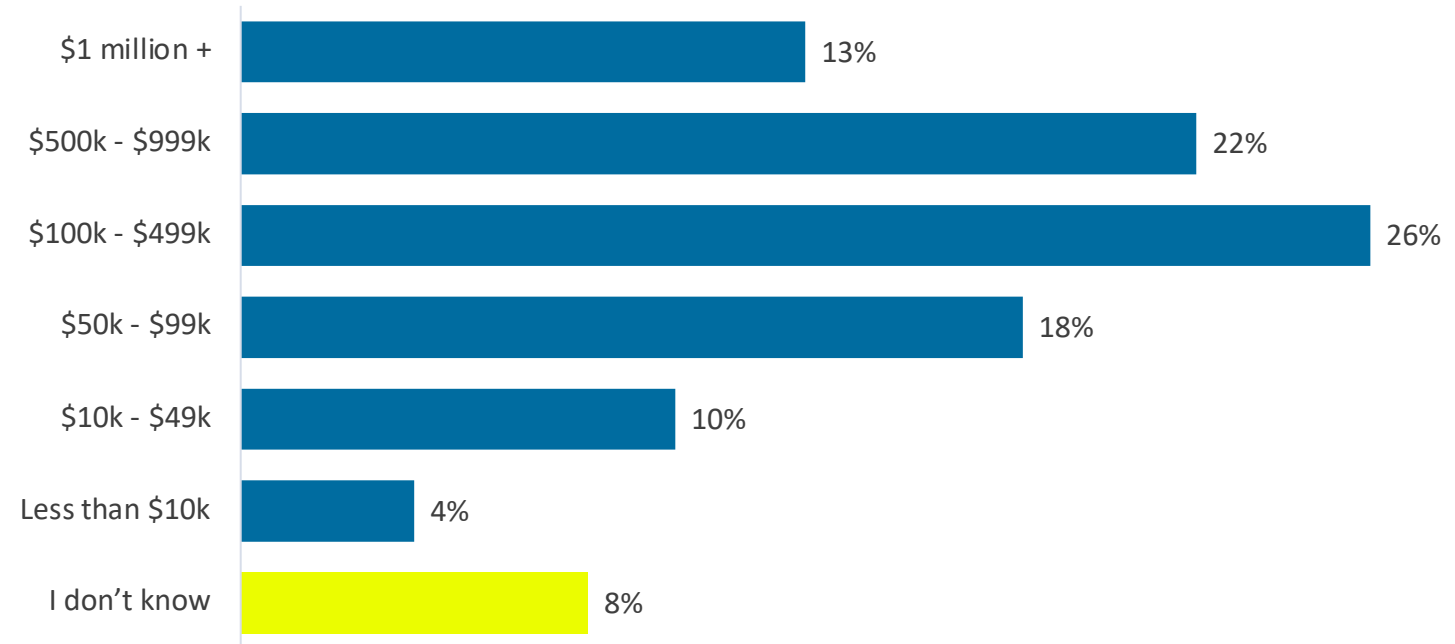
Considering RPA Migration



RPA Migration Budgets

In Blueprint's 2022 RPA migration research, organizations that had already performed an RPA migration spent an average of \$500,000 to migrate their automation estates to a new RPA platform. Those in the process of switching RPA providers expected the same level of investment.

RPA migration budgets for organizations who had already switched RPA tools in 2022

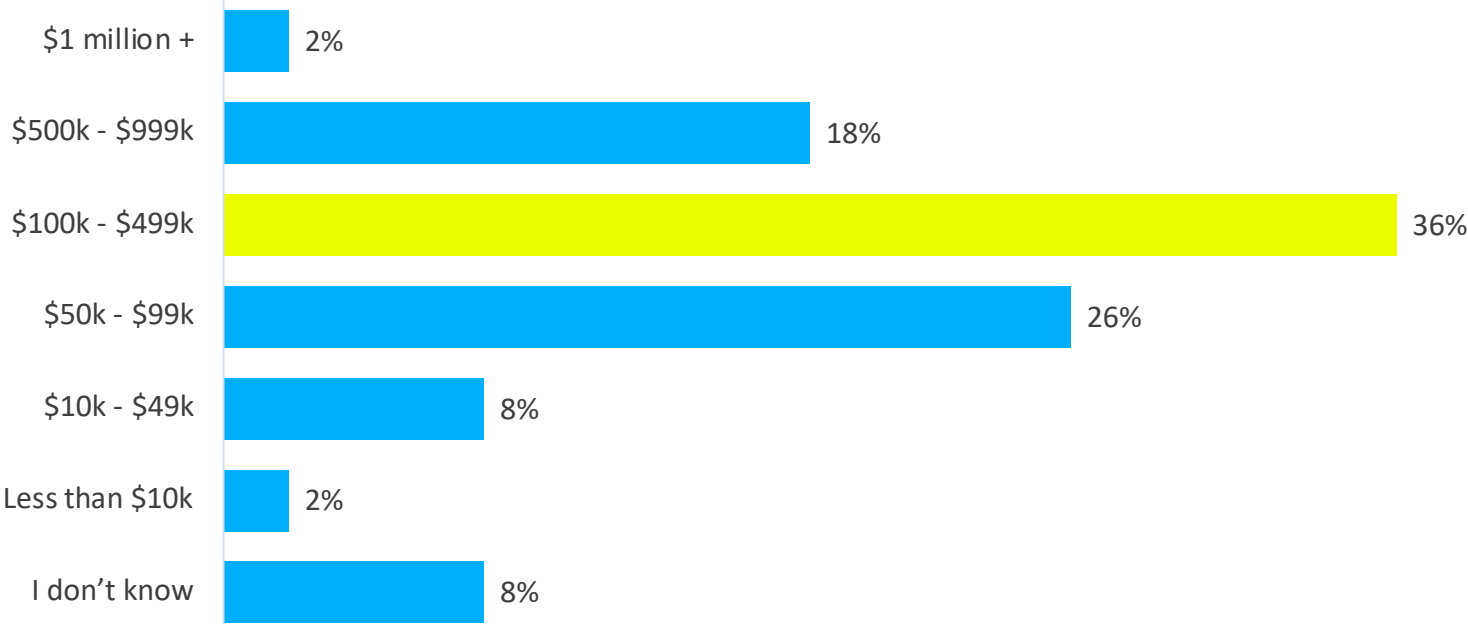


RPA Migration Budgets - Already Switched RPA Tools

In 2023, the data has shifted slightly.

Companies that have already migrated their RPA estates onto a new tool spent an average of \$300,000 to do so.

RPA migration budgets for organizations who had already switched RPA tools in 2023



RPA Migration Budgets

There are several explanations for the decrease in RPA migration costs. Primarily, the RPA estates migrated in 2023 are considerably smaller when compared to 2022 (~70 automations in 2023 vs ~120 automations in 2022).

Additionally, purpose-built technology that automatically converts and migrates the bulk of automation estates are now available that further drive migration costs down when compared with manual methods.

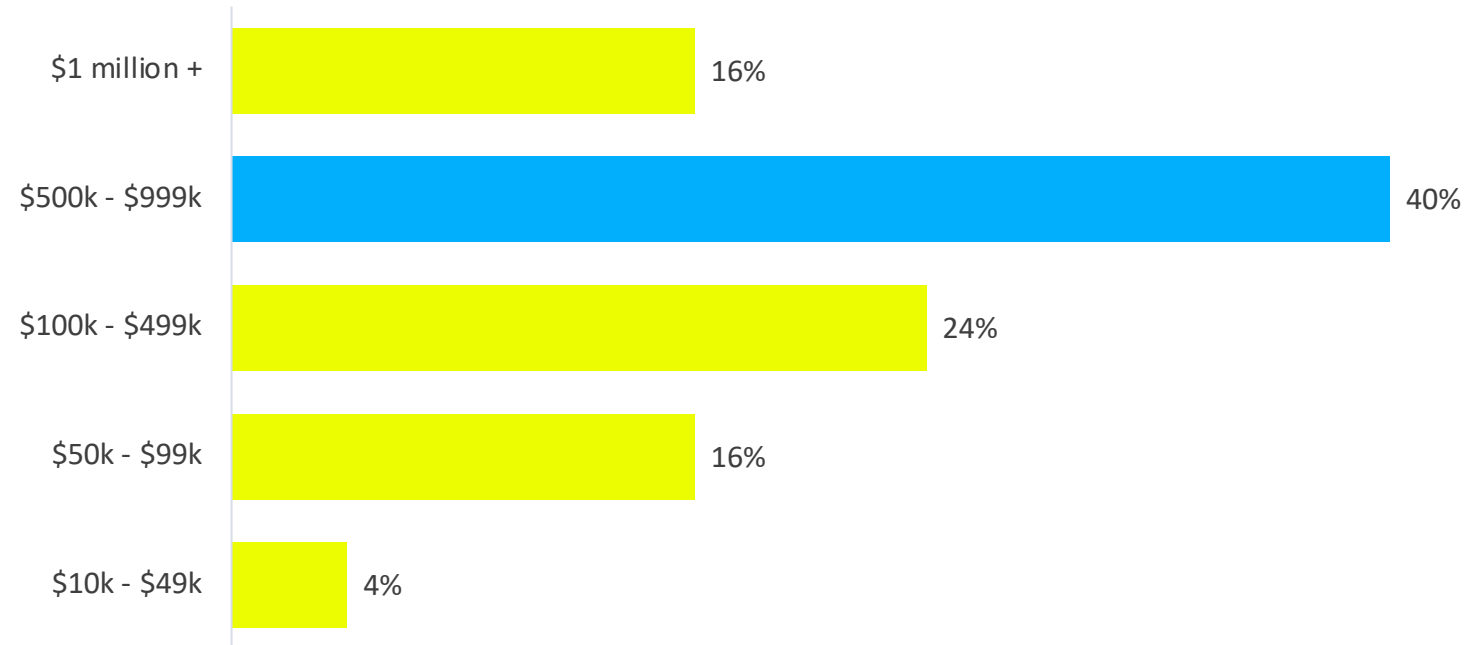
RPA estates migrated in 2023 are considerably smaller when compared to 2022 (~70 automations in 2023 vs ~120 automations in 2022)

RPA Migration Budgets – In the Process of Switching RPA Tools

Conversely, organizations in the process of migrating their RPA estates to new automation platforms are expecting to pay slightly more for their migrations (\$600,000 in 2023 vs \$500,000 in 2022).

The larger investment is most likely attributed to the larger RPA estates this segment is in the process of migrating (87 automations on average).

RPA migration budgets for organizations in the process of switching RPA tools in 2023

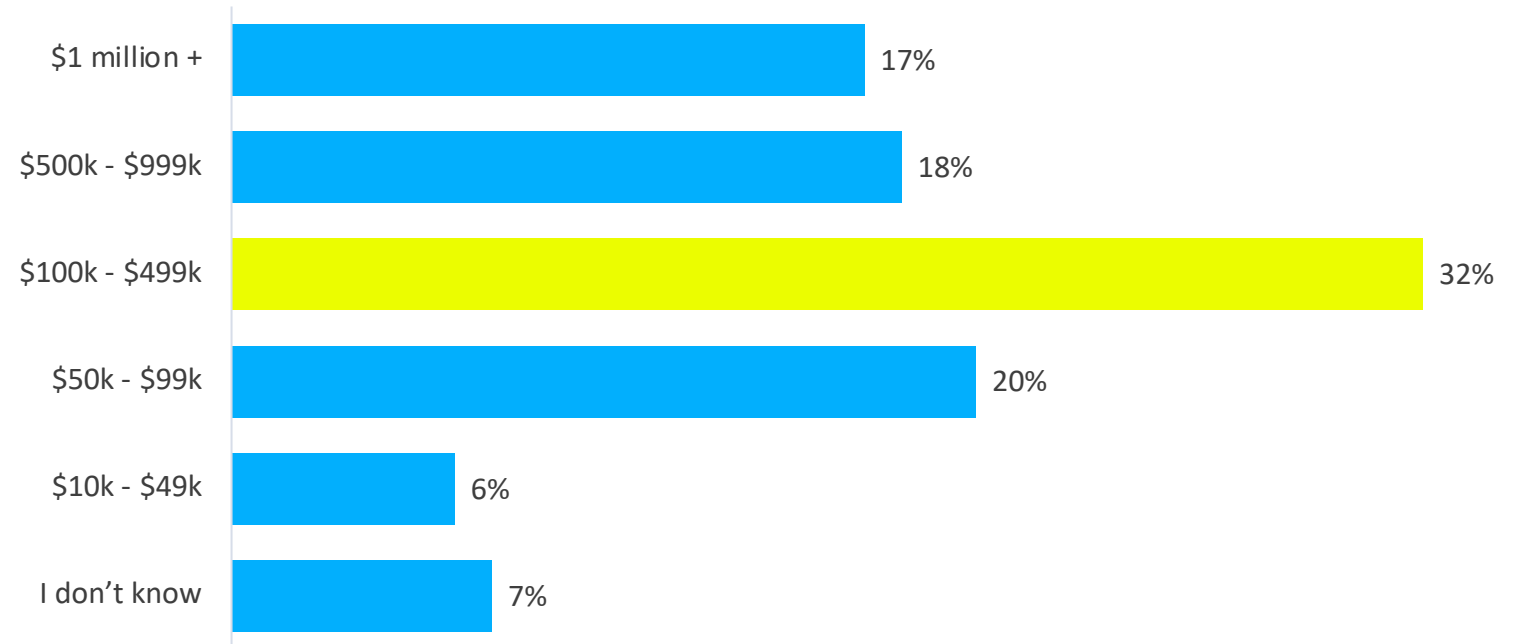


RPA Migration Budgets – Considering RPA Migration

Organizations currently considering RPA migration are allocating an average budget of \$500,000 to perform their switch, falling in line with 2022 figures.

Naturally, large enterprises in this category expect to invest \$600,000 for the migration, anticipating higher costs for the increased complexity, regulation handling, and dependencies that come with larger organizations.

RPA migration budgets for organizations considering switching RPA tools in 2023

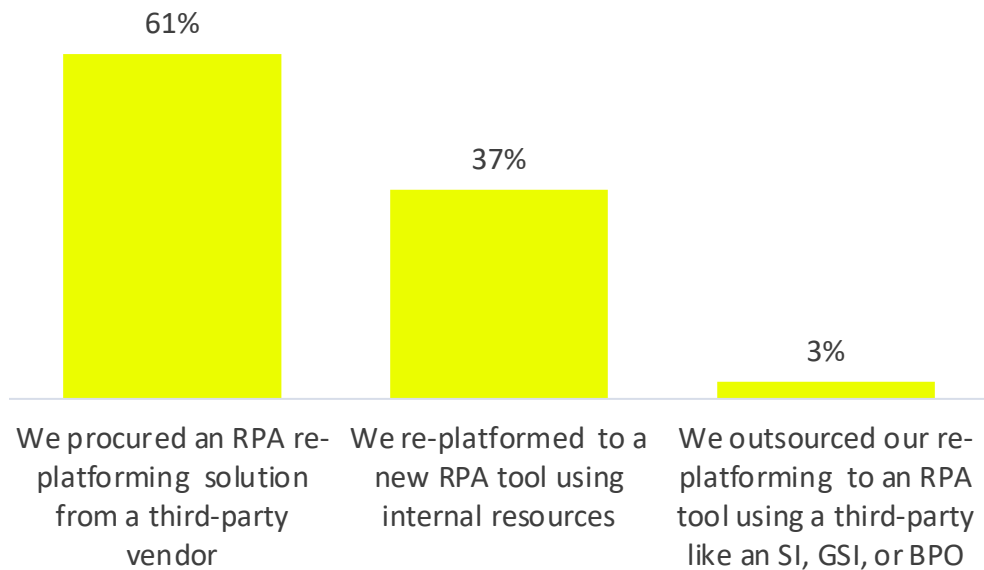


How Organizations Completed Their RPA Migrations – Already Switched RPA Tools

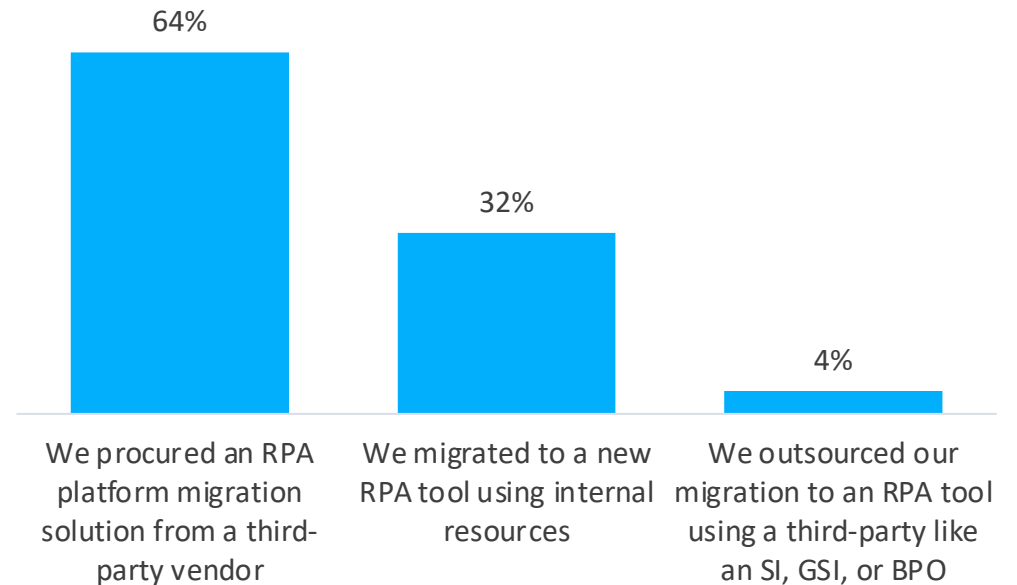
Considering the complexity involved, there is ample interest in how organizations completed or plan to complete their RPA migrations.

In 2022, those who had already completed their switch to a new RPA vendor did so using an RPA migration solution. In 2023, nearly the identical proportion of companies that had completed their switch to a new RPA platform did the same.

Organizations who have already switched RPA tools in 2022



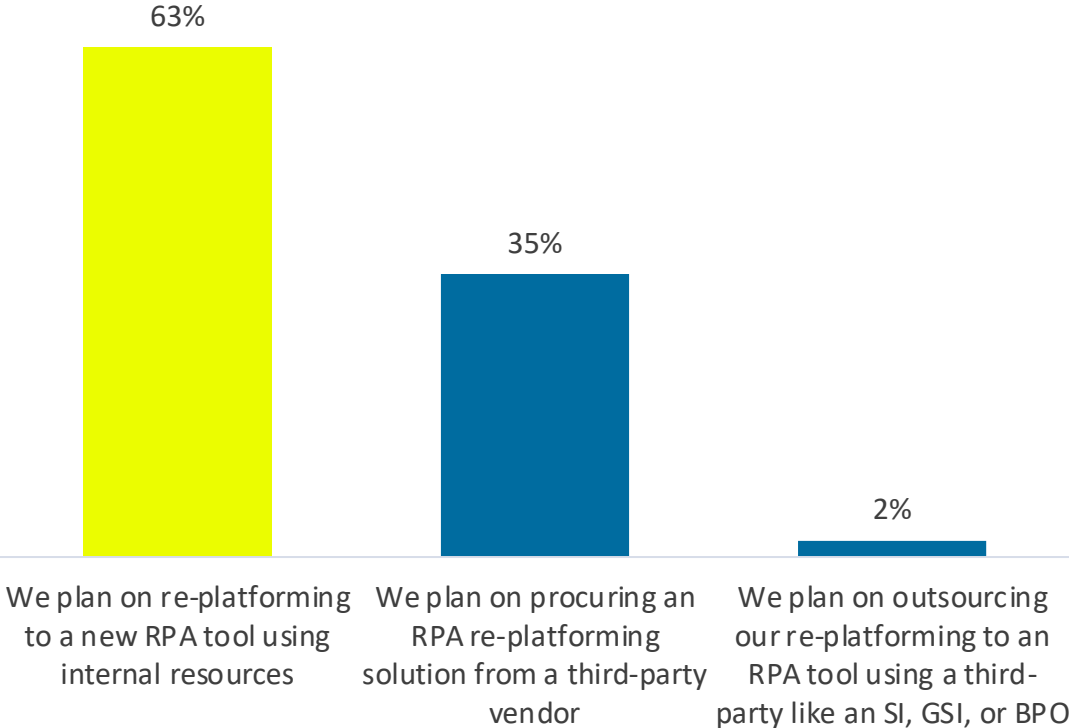
Organizations who have already switched RPA tools in 2023



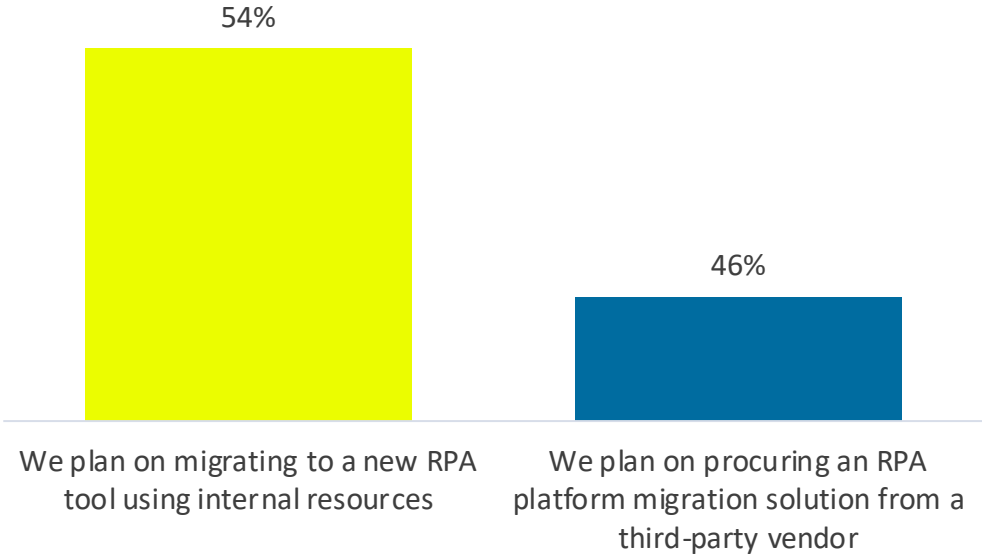
How Organizations Completed Their RPA Migrations – In the Process of Switching

Curiously, in 2022, the majority of organizations in the process of migrating their RPA estates to a new RPA vendor planned to do so with internal resources. That phenomenon remained true in 2023.

Organizations in the process of switching RPA tools in 2022



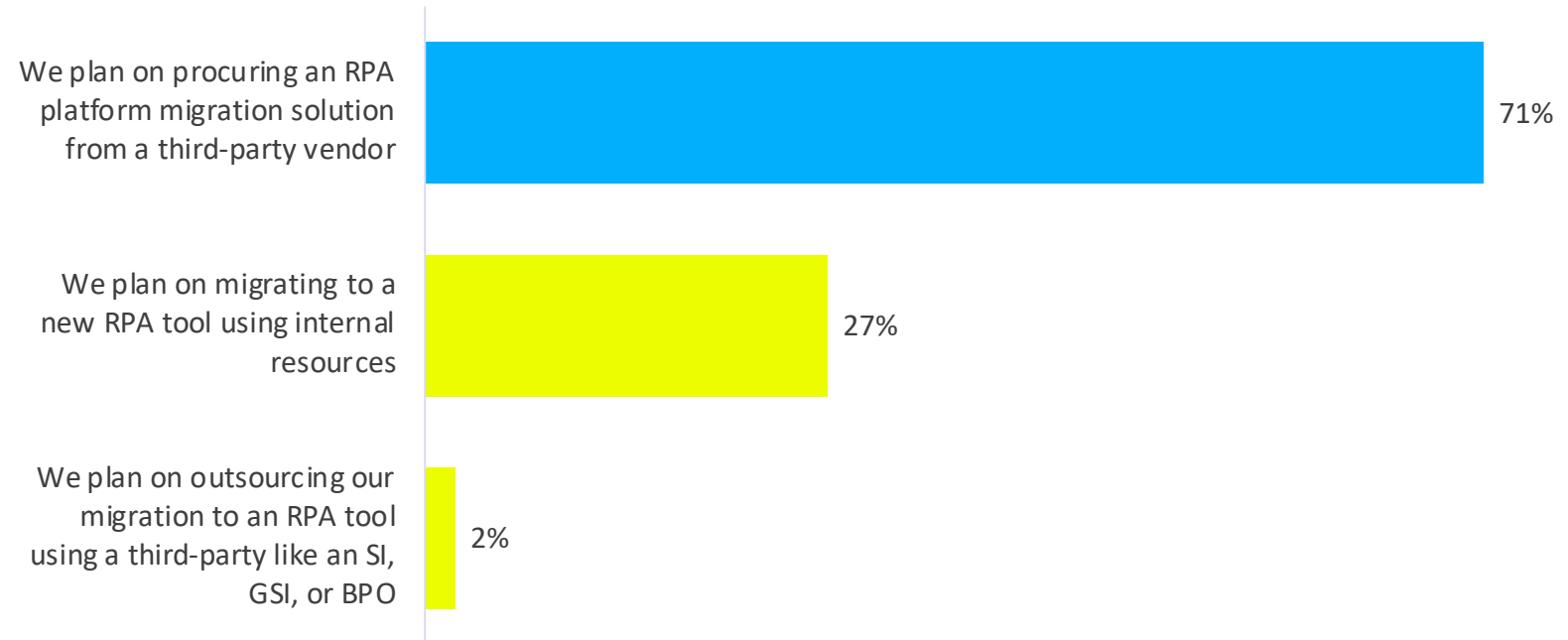
Organizations in the process of switching RPA tools in 2023



How Organizations Completed Their RPA Migrations – Considering RPA Migration

Conversely, organizations still considering RPA migration plan to do so by procuring an RPA migration solution from an external vendor, indicating more thorough due diligence considering the emergence of RPA migration case studies and technology providers available today.

71% of organizations considering to switch RPA tools would plan on procuring an RPA platform solution from a third-party vendor



06

THE EXPECTED & REALIZED CHALLENGES OF RPA MIGRATION

- What challenges do organizations anticipate?
- What challenges did organizations encounter?



The Expected and Realized Challenges of RPA Migration

This research shows that there is real and eager interest in migrating RPA estates to more feature-rich, cost-effective RPA platforms. One of the biggest deterrents are the challenges that RPA migrations pose, especially in the absence of knowing that there are robust solutions that can accelerate the RPA migration while minimizing the effort and time it takes to switch.

In 2022, the organizations that were in the process of migrating their RPA estates to new automation platforms expected rebuilding their automations and the need for specialized, technical resources to be the biggest challenges they would face.

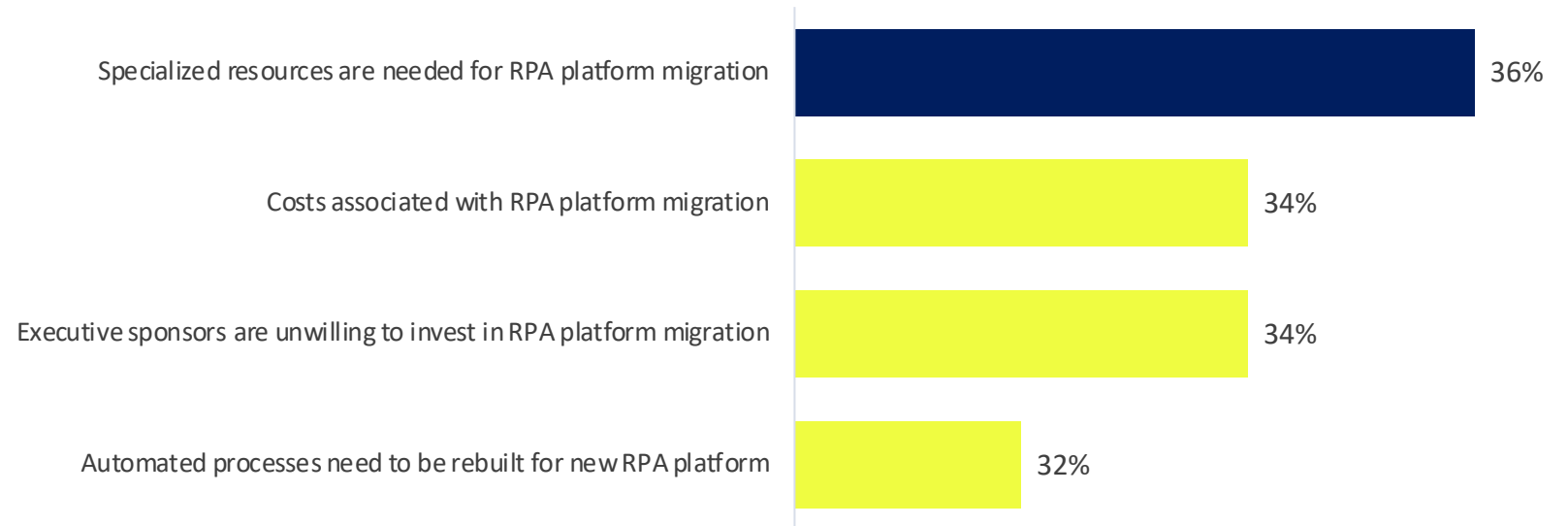
In 2023, those perceptions seem to have shifted. The need for specialized resources is still a major concern, however so too are the costs associated with RPA migration and push-back from executives reluctant to sponsor a switch to a new RPA vendor.

The need for specialized resources is still a major concern, however so too are the costs associated with RPA migration and push-back from executives reluctant to sponsor a switch to a new RPA vendor.

The Expected and Realized Challenges of RPA Migration – In the Process of Switching

Considering that these organizations plan to migrate their RPA estates manually, their concerns are logical considering the time, effort, and investment manual RPA migrations demand. It's safe to assume their expected challenges would vary if they were set on procuring RPA migration technology that would alleviate those concerns considerably.

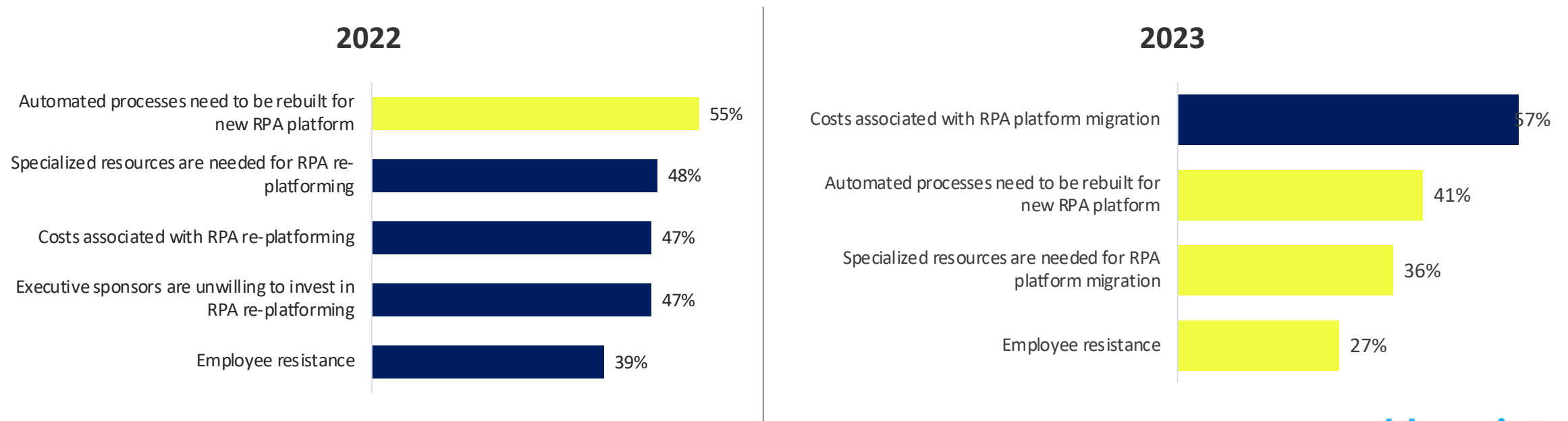
The need for specialized resources (36%), RPA platform migration costs and an unwillingness to invest from executive sponsors (both 34%) are the main challenges faced by organizations switching RPA platforms



The Expected and Realized Challenges of RPA Migration – Considering RPA Migration

Organizations currently considering RPA migration mirror their expected challenges from 2022 but in a slightly different order. The cost of migration has taken top spot – unsurprising considering the lingering threats of a contracting economy – while specialized resources and rebuilding automations for the new destination RPA platform continue to preoccupy automation leaders debating a switch.

Of interest is the lack of a concern that employee resistance and executive support plays in this segment. This suggests that the reduced costs and the simplicity destination RPA platforms promise is welcomed by both employees and executives respectively.

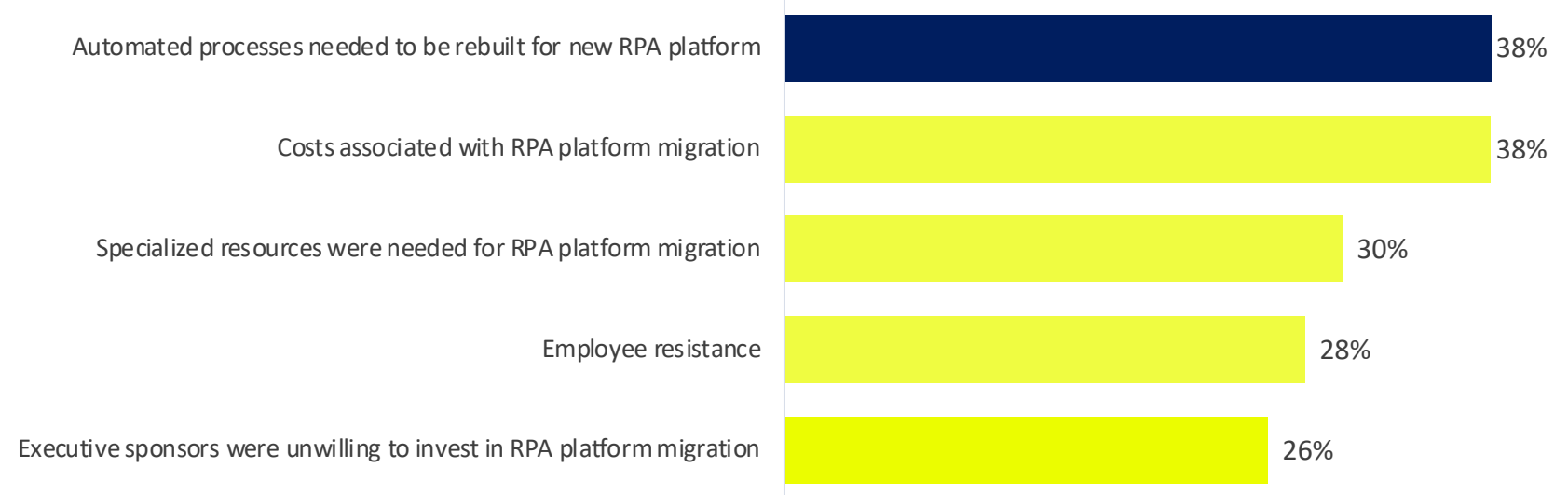


The Expected and Realized Challenges of RPA Migration – Already Switched RPA Tools

In terms of realized challenges, organizations that already completed their RPA migrations report similar concerns from 2022 to 2023 with one small difference. The need for specialized resources and rebuilding automations remain primary challenges, however the cost of RPA migrations has also become a realized complexity.

This can largely be attributed to shrinking budgets in the face of a possible recession. While the outlay for RPA migration is significant in year one of any switch, the increasing and exponential returns from reduced licensing fees, simplified RPA design and delivery, and better capabilities in year two, three, etc. justify those costs.

The need to rebuild automated processes for the new RPA platform and RPA platform migration costs (both 38%) were the main challenges for organizations switching RPA tools



07

CONCLUSION



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RPA Migration in 2023: Conclusion

RPA migration remains a very real initiative for numerous organizations that have adopted automation in 2023. What's driving RPA migrations to new automation platforms is a desire to reduce expensive licensing fees, leverage better capabilities, and realize better compatibility with existing enterprise architecture.

IT remains a primary driver and sponsor for RPA migration, however Finance & Accounting and the executive leadership is still heavily involved with some variance depending on where an organization is in their RPA migration journey.

The RPA estates that companies plan or have already migrated are still significant, even though they're somewhat

smaller than what was reported in 2022, however all organizations with an interest in migrating their RPA estate to a new vendor expect that it will take 7-12 months to complete the switch.

Cost remains a high concern for all companies interested in RPA migration, however they are allocating sizeable budgets to migration ranging from \$500k to \$600k. While resources and costs remain the biggest challenges organizations have experienced or are expecting to encounter, the emergence of automatic RPA migration solutions like Blueprint are proven to dramatically reduce the cost and effort of migration, especially when compared to manual methods. For more information, visit www.blueprintsys.com/rpa-migration.

SUMMARY

Respondent demographics summary

DEMOGRAPHICS

Country of residence



TOTAL RESPONDENTS: 410



150



150



75



75



50

Audience



Switching complete: 10%



Switching in progress: 10%



Considering switching: 38%



Not switched or considering: 42%

Role type



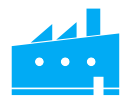
- 14% of respondents held Owner / C-suite level positions
- 39% of respondents held Senior Manager / Head positions
- 18% of respondents held VP / Director positions
- 27% of respondents held Analyst / Manager positions
- 3% of respondents held Developer positions

Size of company



# of employees	1,000 – 4,999	5,000 – 9,999	10,000+
% of respondents	50%	20%	31%

Business Industry



COMPANY SECTORS:
TOP 3:



SOFTWARE/TECH:
18%



MANUFACTURING:
14%



FINANCIAL SERVICES:
12%

Summary & Overview

01

The desire to migrate RPA platforms is very much active

More than half of the respondents for this research (58%) report that they are considering, in the process of, or have already migrated their RPA estates to new RPA platforms.

02

Better capabilities, less complexity, reduced costs motivating RPA migrations

Organizations are looking to migrate their RPA estates to new platforms for three main reasons: companies want to leverage better capabilities and features, simplify automation design and delivery so the average business user can contribute to automation, and reduce expensive licensing fees.

03

RPA migrations are being driven by IT, Executives, and Finance & Accounting

The traditional owners and early adopters of automation – IT and Finance & Accounting – are still the prominent organizations driving the demand to migrate RPA estates to better automation platforms.

The executive leadership has also become heavily involved as the main sponsors in some cases responsible for signing off on the business cases to solidify RPA migrations.

04

Not everyone plans to migrate their RPA estates the same way

Organizations that are considering RPA migration and companies that have already completed a switch, rely on procuring an RPA migration solution from a third party to complete their moves.

Those in the process of their RPA migrations however plan to complete their projects manually using internal resources. The assumption is that those project budgets and timelines quickly get out of hand, forcing them to procure automatic RPA migration solutions in the marketplace to complete their projects on time and to stay within budget.

05

Organizations are budgeting for RPA migrations

While organizations are concerned about the cost of RPA migrations, they are allocating sizeable budgets to switching RPA tools. Those that have already migrated their RPA estates, spent an average of \$300,000 to do so.

Organizations in the process of migrating their automations to new RPA platforms expect to pay an average of \$500,000 to fund their moves and those considering RPA migration are allocating an average of \$600,000 to complete their switch, indicating that there is substantial value and ROI in moving to a new RPA platform supporting all these business cases for RPA migration.

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Blueprint Software Systems is a global software company that helps organizations assess and improve their process automation practice, increasing the value their automations deliver while reducing operating costs. Blueprint's platform ingests entire automation portfolios and delivers invaluable insight and analytics into those estates, indicating where there are redundancies, overly complex automations, and re-platforming opportunities to migrate entire digital workforces to new generation intelligent automation platforms at a fraction of the cost and quicker than any other option available.

For more information, visit www.blueprintsys.com