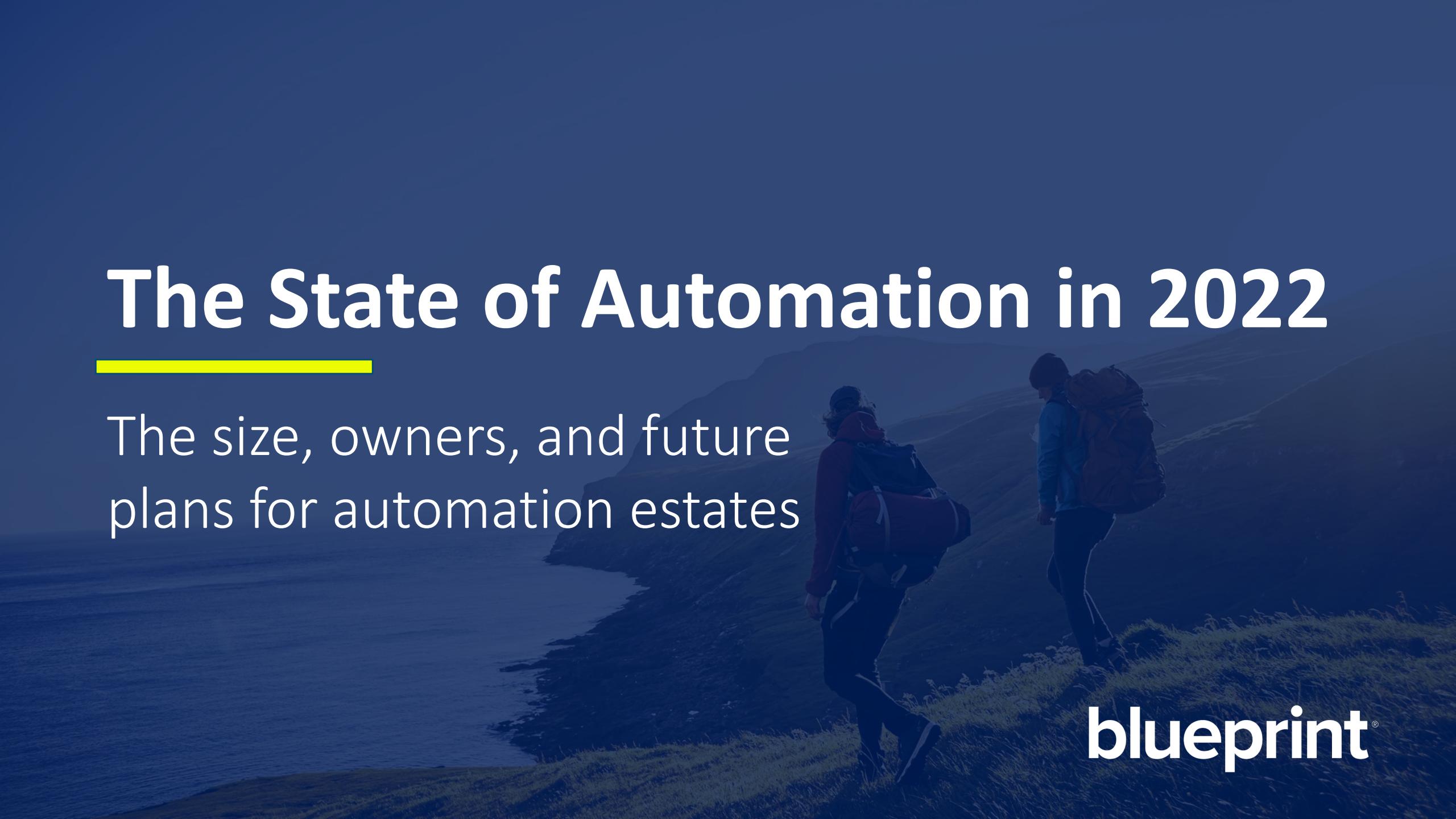


The State of Automation in 2022

The size, owners, and future
plans for automation estates

A photograph of two hikers standing on a grassy cliff edge, looking out over a body of water. One hiker is in the foreground on the right, and another is further back on the left. They are both wearing backpacks and outdoor gear.

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Key Statistics

On average, companies have

120

automations in production

\$480 K

is the average spend on automation annually

IT and Finance & Accounting
are the departments that most commonly own RPA in organizations

76%

of respondents reported that they use Microsoft Power Automate as their RPA execution tool

40%

reported to use multiple RPA platforms in their automation practice

Improving RPA governance is the most cited biggest objective for automation programs moving forward

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01

OVERVIEW

- About this research
- Methodology
- What is robotic process automation?



About this Research

Organizations aggressively adopted robotic process automation (RPA) to reduce costs, become more efficient, and increase process execution quality.

After initial quick wins and early benefits from automating as many business processes as they could, certain questions arise such as how mature are automation estates now? Which automation platforms are the most used? And what do organizations plan to do with automation moving forward—double down or divest?.

To answer those questions and more, this report explores:

- ✓ The size of the average automation estate today
- ✓ Who owns and manages automation in organizations
- ✓ The current operating costs for automation and future plans of investment



Methodology

To examine the state of RPA, Blueprint commissioned a survey of 400 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 2022 using an email invitation and an online survey.

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

INDUSTRIES	DEPARTMENTS
FINANCIAL SERVICES	FINANCE & ACCOUNTING
BANKING	IT
HEALTHCARE/PHARMA/LIFE SCIENCES	OPERATIONS
INSURANCE	HR
TELECOMS	INNOVATION/DIGITAL TRANSFORMATION/DIGITAL OPERATIONS
OIL & GAS	EXECUTIVE LEADERSHIP
UTILITIES	AUTOMATION/INTELLIGENT AUTOMATION/RPA

This research was done in partnership with: 

What is Robotic Process Automation (RPA)?

This research focuses on robotic process automation (RPA).

Robotic process automation is the application of technology to automate the execution of business processes. Specifically, RPA is the automation of business tasks that are part of larger business processes and are normally highly-repeatable and rules-based.

Another form of automation growing in popularity is intelligent automation which refers to the inclusion of different technologies like artificial intelligence (AI) and machine learning that enables the automation of more complex, end-to-end business processes that can be decision-based.

Automation or RPA platforms are the tools used to develop, build, test, orchestrate, and monitor automations. Leading providers of automation platforms include Microsoft Power Automate, Automation Anywhere, UiPath, and Blue Prism.

02

RPA ADOPTION

- Size of automation estates
- Current spend on automation annually



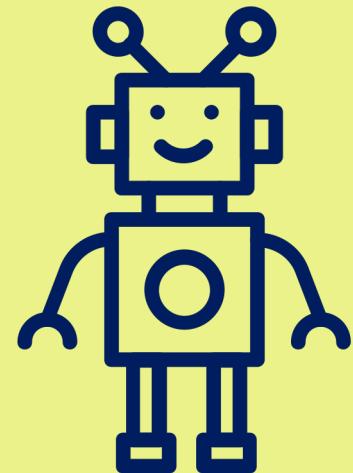
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RPA Adoption: Size of automation estates

Business process automation was adopted at an incredible rate at the height of its hype cycle. Organizations embraced it as a solve-all to reduce costs while increasing efficiency and output quality.

While support and maintenance issues, excessive technical complexity, and high costs of ownership have presented significant challenges as process automation programs have grown and matured, the research shows many organizations are well along their way in their business process automation journey. On average, the companies surveyed had 120 automated processes currently in production, suggesting that companies have significant digital workforces. The top 10% of respondents even reported to having over 251 automations in their estates.

**On average,
companies have 120
automations currently
in production.**

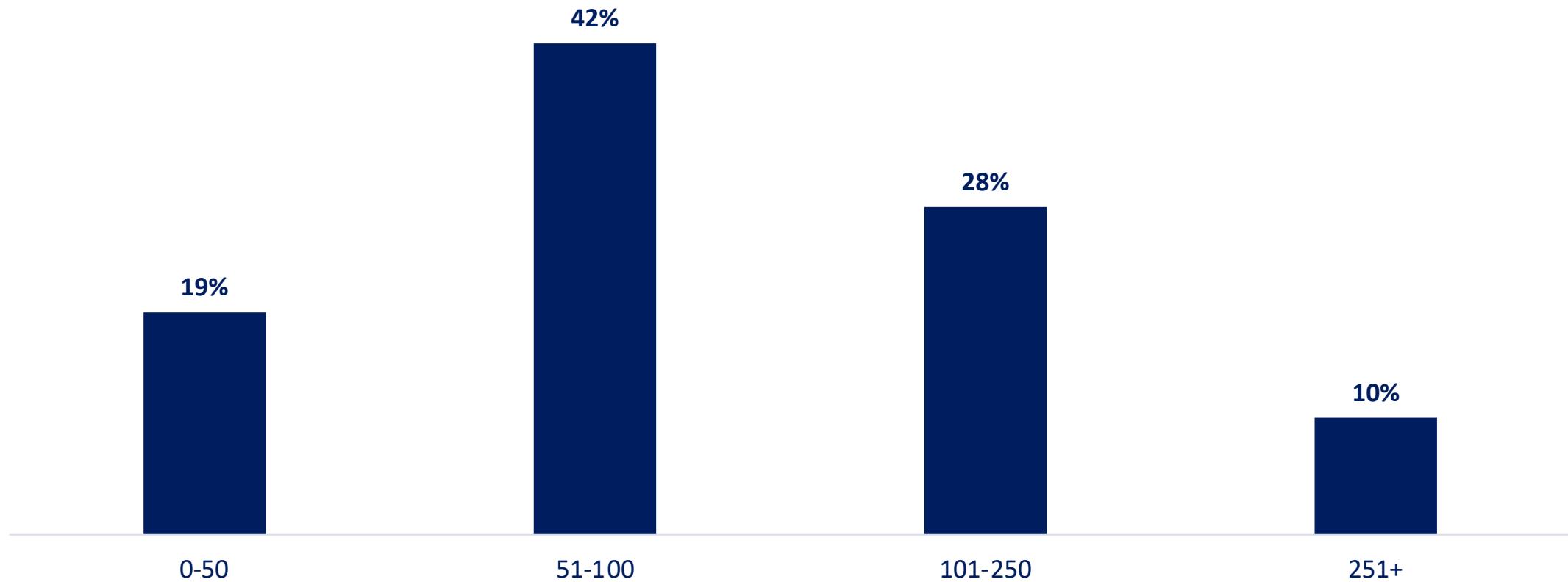


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RPA Adoption : Size of automation estates

How many automated processes do you currently have in production?

On average, companies have 120 automated processes currently in production



RPA Adoption: Annual spend on automation

A major challenge that has surfaced with the accelerated adoption of RPA as automation estates have grown and matured is the increasing operational expense (OpEx) and total cost of ownership.

When asked how much they invested in process automation annually, the average annual spend on RPA is \$480,000, however in the highest tier, 13% of respondents reported that they spend over \$1 million on RPA each year, the majority of which were from organizations with over 10,000 employees. Smaller businesses with 499-1000 employees predominantly reported spending \$100K-\$400K on RPA annually, while those in the mid-sized range (999-5000 employees) fell into the \$500K-\$999K range in terms of annual investment for their automation programs.

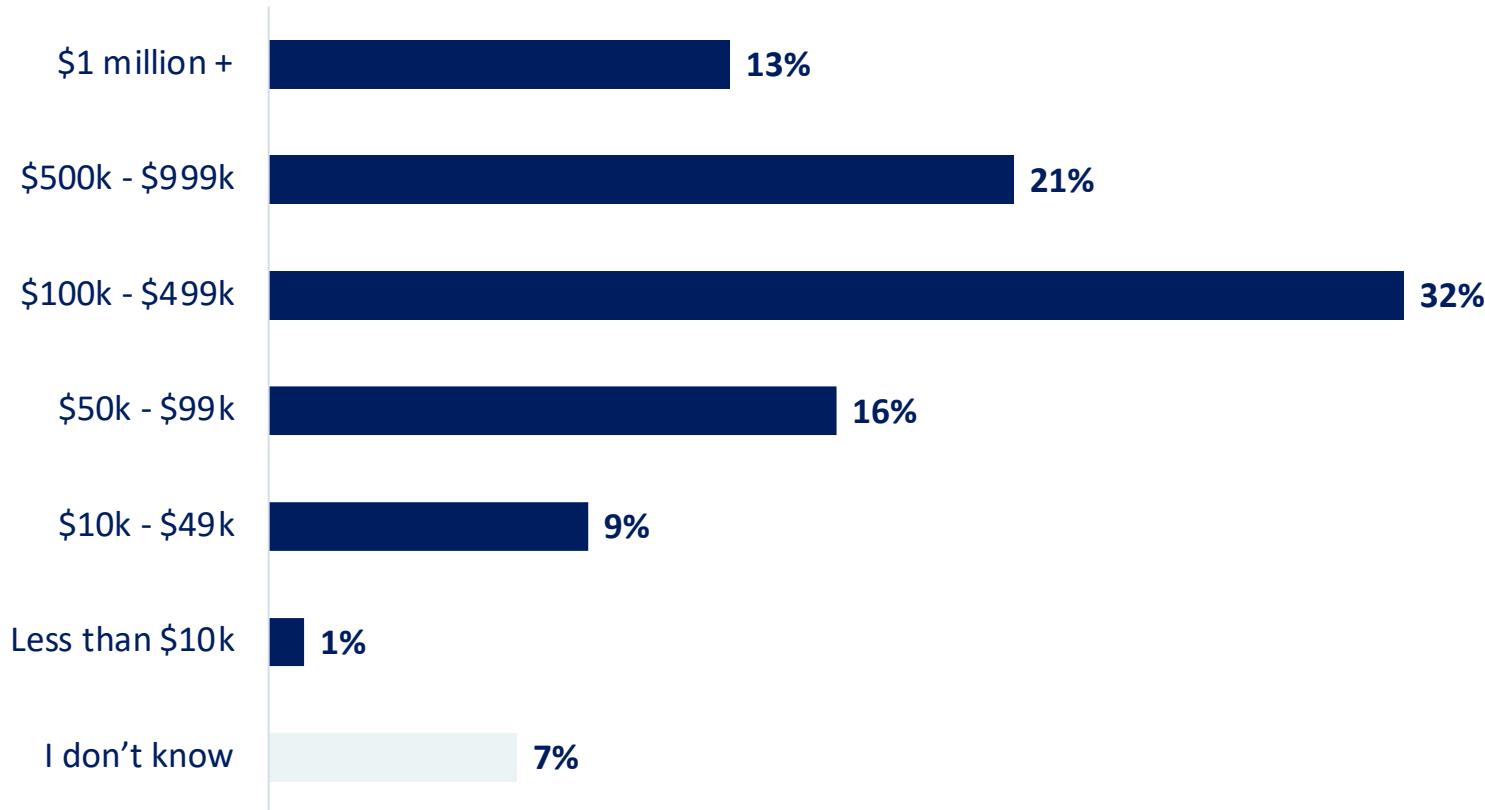
Rising OpEx and total cost of ownership is in fact a key driver motivating automation re-platforming as organizations look for more cost-effective options in the RPA vendor market.

The average annual spend on RPA is \$480,000 with 13% of respondents reporting they spend over \$1 million annually.



RPA Adoption : Annual spend on automation

On average, organisations spend \$480,000 annually on RPA



03

RPA MANAGEMENT

- The business units that own RPA



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RPA Management: Which business units own RPA?

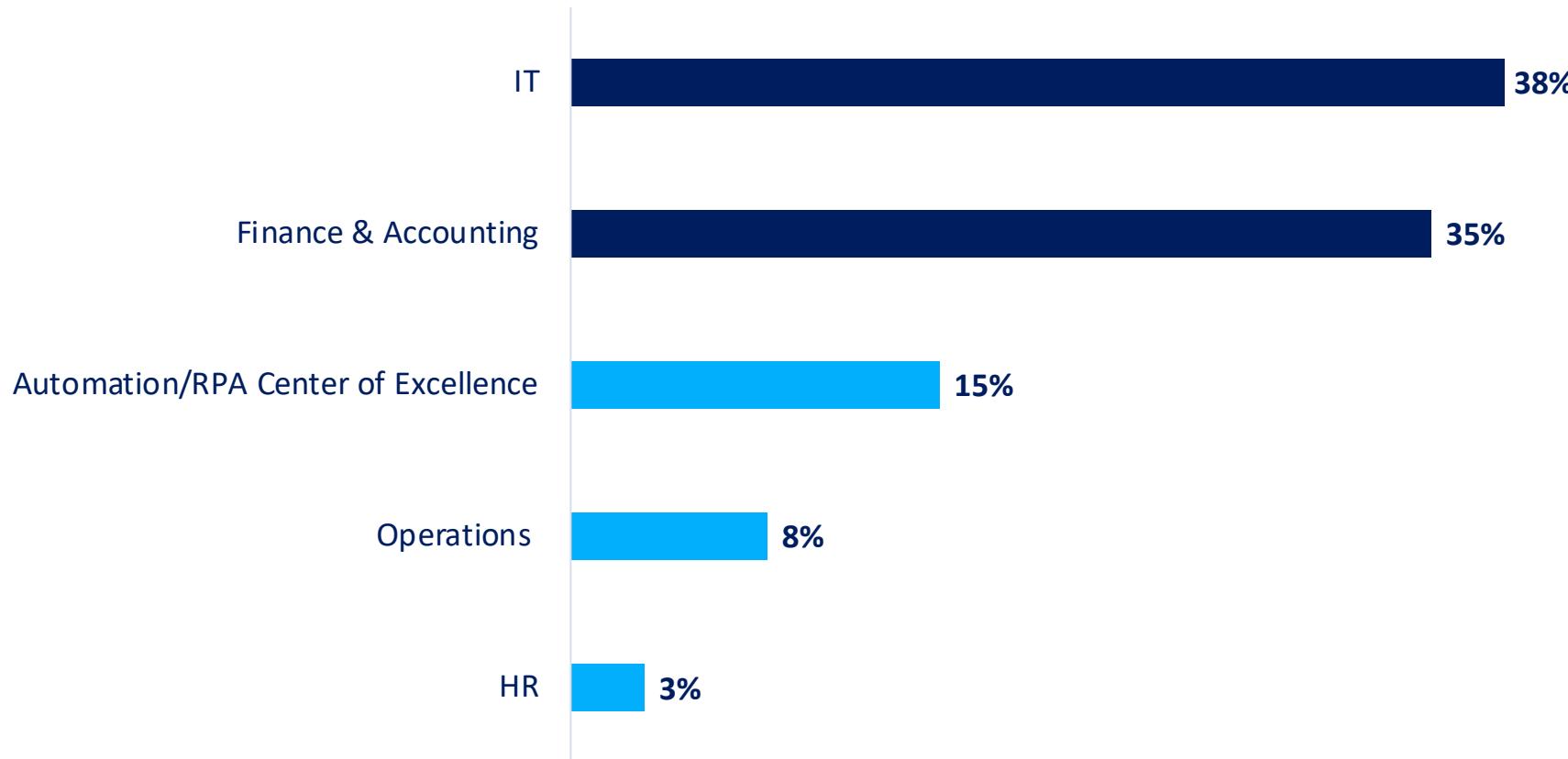
The most common business units to own RPA in organizations are IT (36%) and Finance & Accounting (35%) respectively. That comes as no surprise.

Robotic process automation has traditionally been very complex work using very technical software, so dependence on highly-skilled, technical resources has been high. It's only logical that IT would own the budget for RPA considering their major role in automation's implementation and management.

Finance & Accounting is also a prominent owner of RPA because that department was an initial adopter and automation champion. Finance & Accounting owns a myriad of processes like invoice and payment processing that are typically swivel-chair, rules-based processes, making them ideal candidates for RPA application to increase efficiency and quality. Because of the sheer number of applicable processes that they have and their long-standing support for RPA, they would logically be prominent owners of this technology and have it fall under their guidance and budgets.

RPA Management: Which business units own RPA?

For most companies, either the IT (38%) or Finance & Accounting (35%) department handles the RPA budget



04

RPA PLATFORM LEADERS

- The most used RPA platforms
- Organizations with multi-platform strategies
- RPA re-platforming



RPA Platform Leaders: The most used RPA platforms

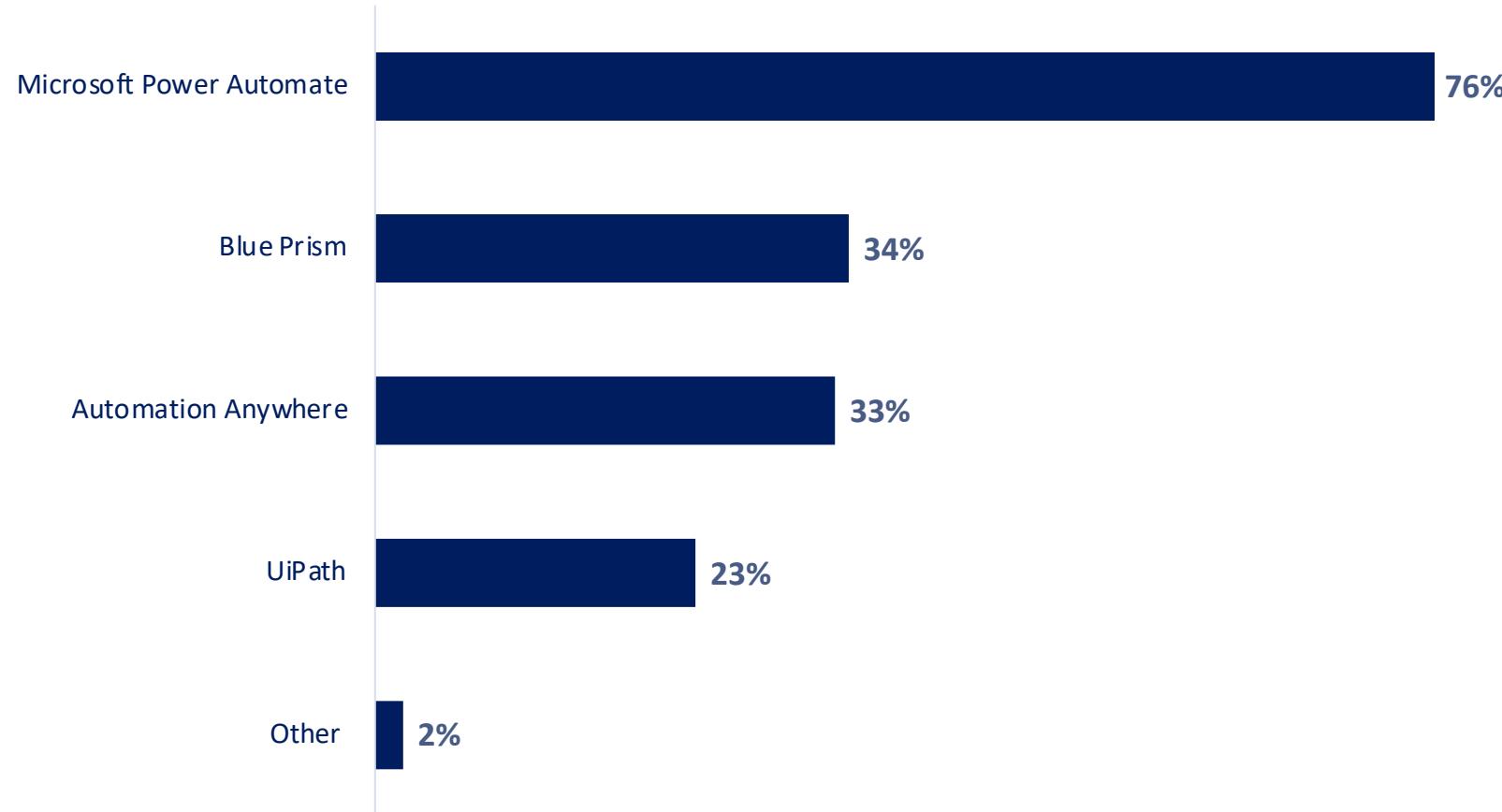
The RPA vendor market has recently become increasingly crowded with new entrants looking to disrupt the traditional leaders and stake their own claim at the growing total addressable market (TAM).

Even with new platforms entering the fray, the 4 leaders – Microsoft Power Automate, Automation Anywhere, Blue Prism, and UiPath – continue to dominate the market. When we asked the 400 participants which platform they used, the clear leader was Microsoft Power Automate.

Even though Microsoft's existence in the RPA space has been relatively short, the reduced licensing fees that significantly lower the total cost of ownership for automation, their extensibility with the rest of the Microsoft ecosystem through native automations, and its ease of use has accelerated Microsoft's rise in popularity. Another reason for the disparity between Microsoft and the rest of the pack is that a sizeable portion of the respondents indicated that they use multiple RPA platforms in their automation practice. While they may use another leading vendor, a lot of organizations have started building and deploying net-new automations in Microsoft Power Automate, especially after Microsoft bundled it for free in Windows 10.

RPA Platform Leaders: The most used RPA platforms

Microsoft Power Automate is the most commonly used RPA tool (76%), followed by Blue Prism (34%)



RPA Platform Leaders: Organizations with multi-platform strategies

Out of all the business leaders surveyed, 40% reported that their organizations were using multiple RPA platforms. A multi-platform strategy, while expensive and seemingly inefficient, is not as uncommon as one would think.

When asked why their organizations were using multiple RPA platforms, the top reasons provided were that specialized tools were being used for specific use cases and that different tools offered better compatibility with enterprise architecture.

Another interestingly popular response provided was that organizations reported to still be evaluating the RPA vendor market. Since it's rather young compared to other enterprise software segments, it seems that organizations are still uncovering which RPA platforms are best for them, according to their needs.

40% of all those surveyed reported to use multiple RPA platforms.



RPA Platform Leaders: Organizations with multi-platform strategies

For those using multiple tools, a quarter do so because they use specialized tools for specific use cases (26%)
A quarter use multiple tools as different tools are more compatible with enterprise architecture (25%)

We use specialized tools for specific use cases. For example, we use Redwood to automate our Finance processes



26%

Different tools are more compatible with our enterprise architecture. For example, we use SAP to automate our SAP processes



25%

We're still evaluating which is the best RPA tool on the market



20%

Different lines of business started independent automation initiatives



17%

Different lines of business prefer different tools



12%

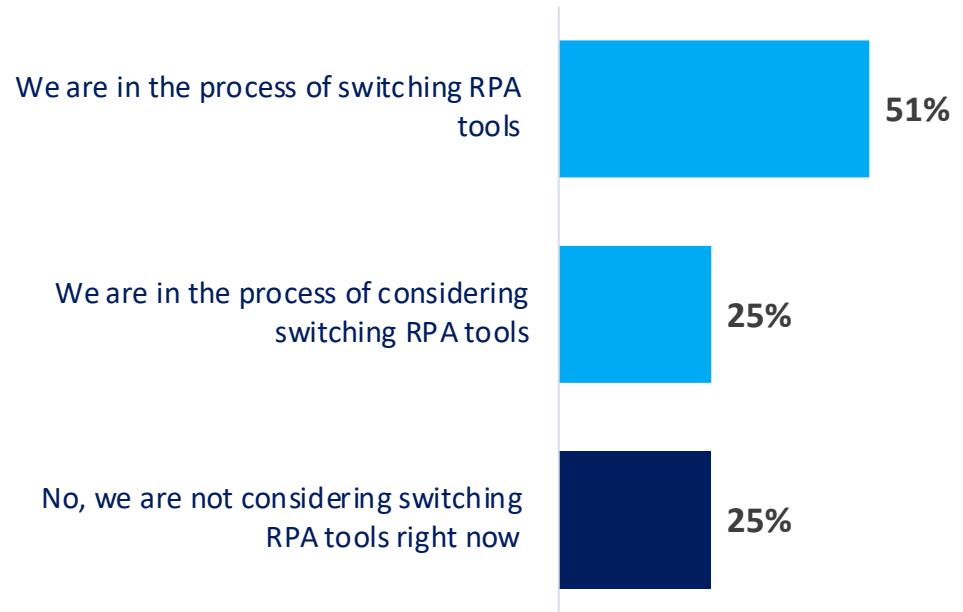
RPA Platform Leaders: RPA Re-platforming

Even as a young enterprise software segment, there is a lot of movement and jostling in the RPA market—automation programs are looking to re-platform their estate onto new platforms for a variety of reasons.

Out of the organizations surveyed, 26% of them have already switched RPA platforms or had at least one business unit in their organization change RPA vendors at some point in the past.

Of the 74% that have always used the same, singular RPA platform, a staggering 76% are in the process of re-platforming their automated processes to another tool or considering a switch. In a previous report Blueprint published based, we dove into the reasons driving automation re-platforming. You can download the report – Process Modernization in 2022 [here](#).

74% of all organizations surveyed still use their original RPA platform. Of those still on their original RPA tool, 74% are in the process of or considering switching.



05

FUTURE PLANS

- What organizations are prioritizing for their automation estates moving forward



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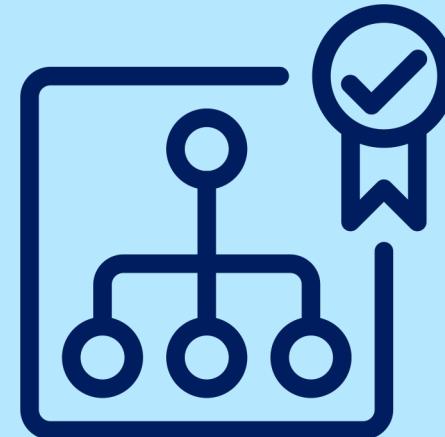
Future Plans: What organizations are prioritizing for their automation estates

When asked what they would focus their automation efforts on in the near to short term, respondents identified several areas they wanted to concentrate on according to the following order:

- Improving RPA governance
- Automating more complex, end-to-end processes
- Applying RPA more broadly across the business and achieving scale

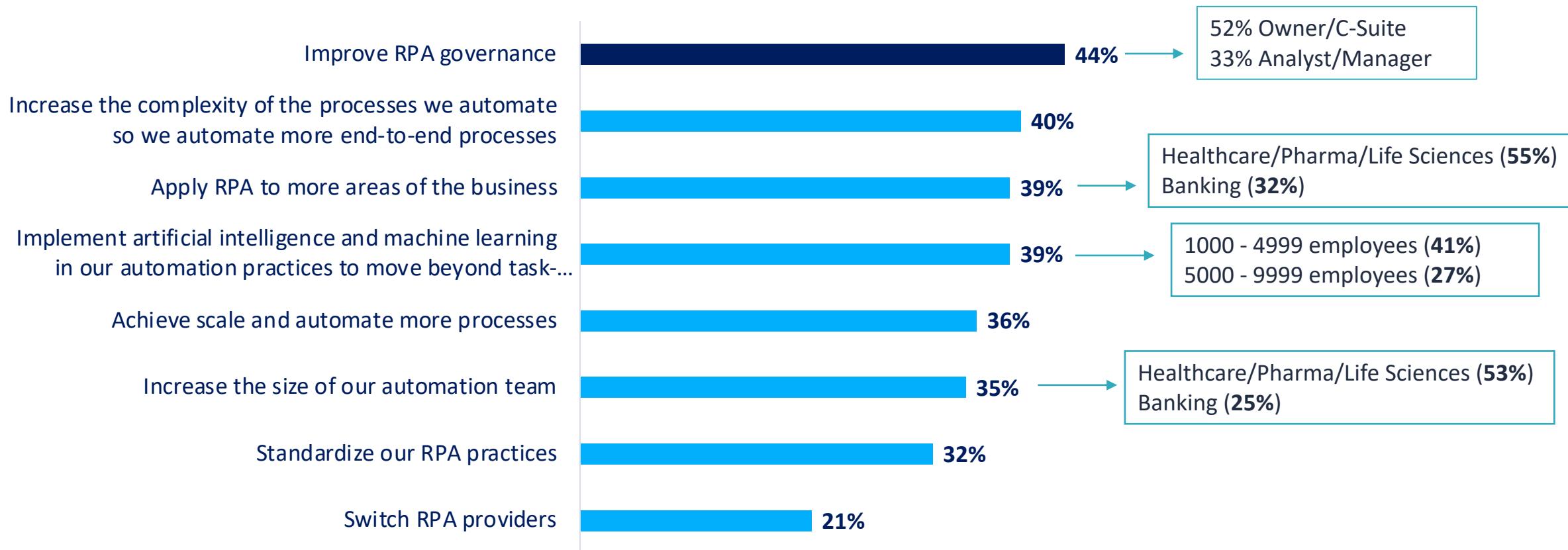
Naturally, organizations want to grow and improve their automation estates and to move beyond simple, rules-based task automation to more complex end-to-end automation of entire business processes where the returns and ROI would be much more significant, increasing the demand for intelligent automation over traditional RPA. It's also important to note that even though it scored relatively low on the list of priorities, 21% of organizations included re-platforming as one of their main objectives as they look to modernize their automation estates from legacy client-based platforms to new-generation cloud-based solutions.

Improving RPA governance is the most cited future plan for RPA (44%), particularly by owners and C-suite executives



Future Plans: What organizations are prioritizing for their automation estates

Improving RPA governance is the most cited future plan for RPA (44%), particularly by owners and C-suite executives



06

CONCLUSION



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The State of Automation: Conclusion

RPA programs are well past the point of initial adoption and now boast automation estates well into the hundreds. With larger automation estates, the total cost of ownership (TCO) and OpEx for RPA has also increased, reaching an average of roughly half a million dollars according to this research.

The increased TCO and a strong desire to automate more complex, end-to-end business processes instead of just smaller, rules-based tasks is driving organizations to newer-generation, intelligent automation platforms like Microsoft Power Automate where businesses are looking to re-platform their existing estates or build net-new automations there because of the lower price point and increased ease of use.

With newer-generation, cloud-native automation platforms becoming available with better capabilities, organizations are also entertaining multi-platform strategies for their automation practices, however there's a host of factors motivating that reality such as disparate automation programs in different business units.

With growing automation estates and a desire to consolidate automation practices, organizations are focusing on improving RPA governance and scaling automation in the near-term—and not to just to more areas of the business. The next frontier in the automation space will be to move beyond task-based automation onto complete, end-to-end intelligent automation with the application of machine learning and artificial intelligence to automate decision-based business processes.

SUMMARY

Respondent demographics summary

DEMOGRAPHICS

Country of residence



Audience



Role type



Size of company



Business Industry



TOTAL RESPONDENTS: 410



150



186



20



20



34



Switching complete: 25%



Switching in progress: 56%



Switching failed: 0%



Not switched or considering: 18%

- 28% of respondents held Owner / C-suite level positions
- 27% of respondents held Senior Manager / Head positions
- 22% of respondents held VP / Director positions
- 20% of respondents held Analyst / Manager positions
- 3% of respondents held Developer positions

# of employees	1,000 – 4,999	5,000 – 9,999	10,000+
% of respondents	60%	18%	22%

COMPANY SECTORS:
TOP 3:



FINANCIAL SERVICES:
47%



BANKING:
21%



HEALTHCARE/PHARMA/LIFE SCIENCES: 13%

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Summary & Overview

01

RPA is no longer in the adoption phase

On average, the companies surveyed had 120 automated processes currently in production, suggesting that companies have sizeable digital workforces. The top 10% of respondents even reported to having over 251 automations in their estates.

02

RPA's total cost of ownership is high

The average annual spend on RPA is \$480,000, however in the highest tier, 13% of respondents reported that they spend over \$1 million on RPA each year.

Rising OpEx is one of the main drivers motivating automation re-platforming as organizations look for more cost-effective options in the RPA vendor market.

03

IT and Finance & Accounting are the most common owners of RPA

The most common business units to own RPA in organizations are IT (36%) and Finance & Accounting (35%) respectively.

IT plays a major role in automation's implementation and management and Finance & Accounting has always been a strong adopter because of the nature of their processes.

04

Microsoft is leading the pack

According to this study, Microsoft Power Automate is the most commonly used RPA tool (76%).

Microsoft's reduced licensing fees that significantly lower the total cost of ownership for automation, their extensibility with the rest of the Microsoft ecosystem through native automations, and Microsoft's ease of use has accelerated its rise in use and popularity.

05

RPA governance needs more attention

Because automation estates have become so large in such a short period of time, a lot of organizations are experiencing automation overload and costly maintenance issues.

Due to this, improving RPA governance is the most cited main objective for RPA (44%) in the near term, particularly by owners and C-suite executives.



Blueprint Software Systems helps organizations design, assess, and improve their automated processes to increase the value their digital workers 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.

Blueprint: Improve your processes. Improve your business.

For more information, visit www.blueprintsys.com