

# State of RPA in 2023

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The size, budgets, governance, infrastructure, and future objectives of automation practices around the world in 2023

**blueprint**<sup>®</sup>

# Key Statistics

On average, companies have

**77**

automations in production

**\$490<sub>k</sub>**

is the average spend on automation each year

**50%** of organizations have

implemented an RPA Center of Excellence to manage automation

**60%**

of organizations use Microsoft Power Automate as their automation platform

**38%**

of companies use multiple RPA platforms, citing better compatibility with enterprise architecture as the main reason

Scale and greater application of RPA across the business are the biggest objectives for RPA programs moving forward

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# 01

## OVERVIEW

- About this research
- Methodology
- What is Robotic Process Automation (RPA)?



# About this Research

Robotic Process Automation (RPA) is well past the adoption phase. Organizations now boast sizeable and sophisticated automation practices to realize all the benefits that RPA promises such as increased efficiency, cost-reduction, and improved quality.

With automation programs in full flight and continuously evolving, it's crucial that we take automation's pulse to better understand how RPA practices are changing, the benefits they're realizing, and more importantly, the challenges they're encountering. At a time where countless organizations are aggressively looking to decrease automation's total cost of ownership and migrate their RPA estates to more cost-effective next-generation automation platforms, this research is designed to illuminate the state of RPA programs at a global scale.

## This research report explores:

- ✓ How big RPA estates are
- ✓ How automation is being managed, owned, and sponsored
- ✓ The technology fueling RPA toolchains
- ✓ The future objectives companies have defined for their automation practice



# Methodology

To examine the state of RPA in 2023, 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 and departments.

This research was done in partnership with: 

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	

# What is 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.

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

- The size of RPA estates
- How RPA estates were implemented
- The types of automations in different RPA estates





## The size of RPA estates

At its inception, automation was eagerly adopted to leverage all the benefits and returns that it promised. The allure of vastly improved process execution in terms of speed and quality and greater efficiency motivated all organizations to rapidly implement this new technology.

Scale however, has been a challenge as companies have found it difficult to increase their application of RPA across their organizations. Even with the challenges of scaling RPA, automation estates (that is, the number of automated processes organizations have in production) is significant and indicates gradual growth. In 2023, the average size of RPA estates that companies reported was 77 automated processes in production. However, 25% of enterprises with over 10,000 employees reported that they had over 250 automations in their estate, indicating that larger organizations are eagerly scaling their application of RPA.

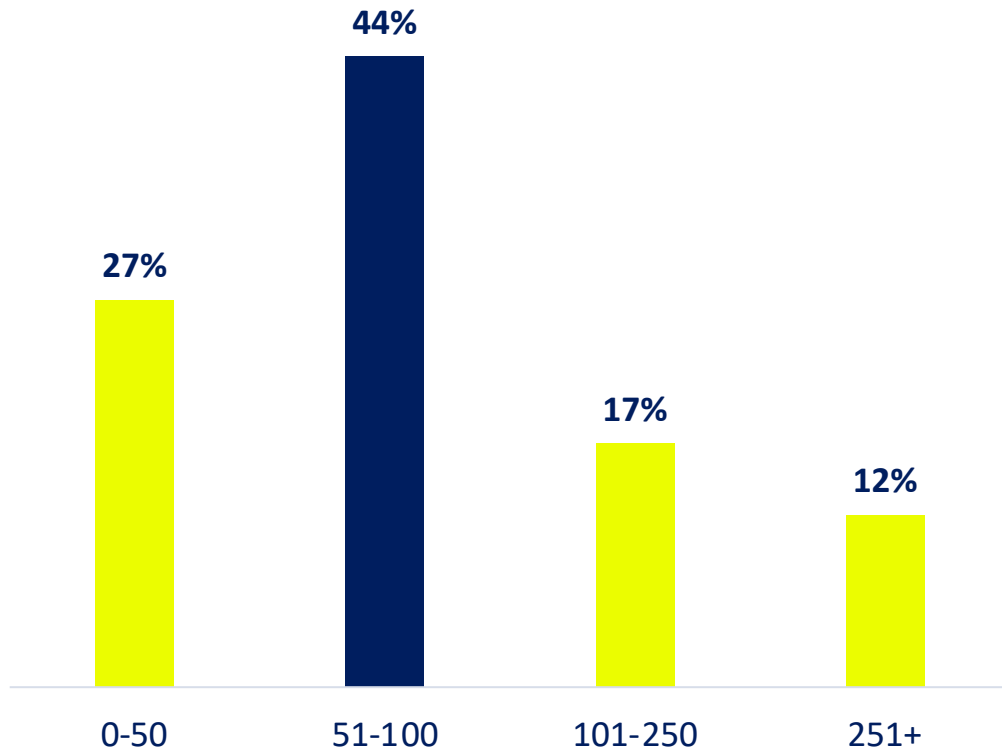
Compared with data from Blueprint's 2022 research on the state of RPA, automation estates have gotten smaller. One possible explanation is the novel attention companies have placed on waste and redundancy—eliminating duplicated automated processes or automations that simply aren't delivering justifiable returns.

**The average size of  
RPA estates that  
companies reported  
was 77 automated  
processes in  
production**

# The size of RPA estates

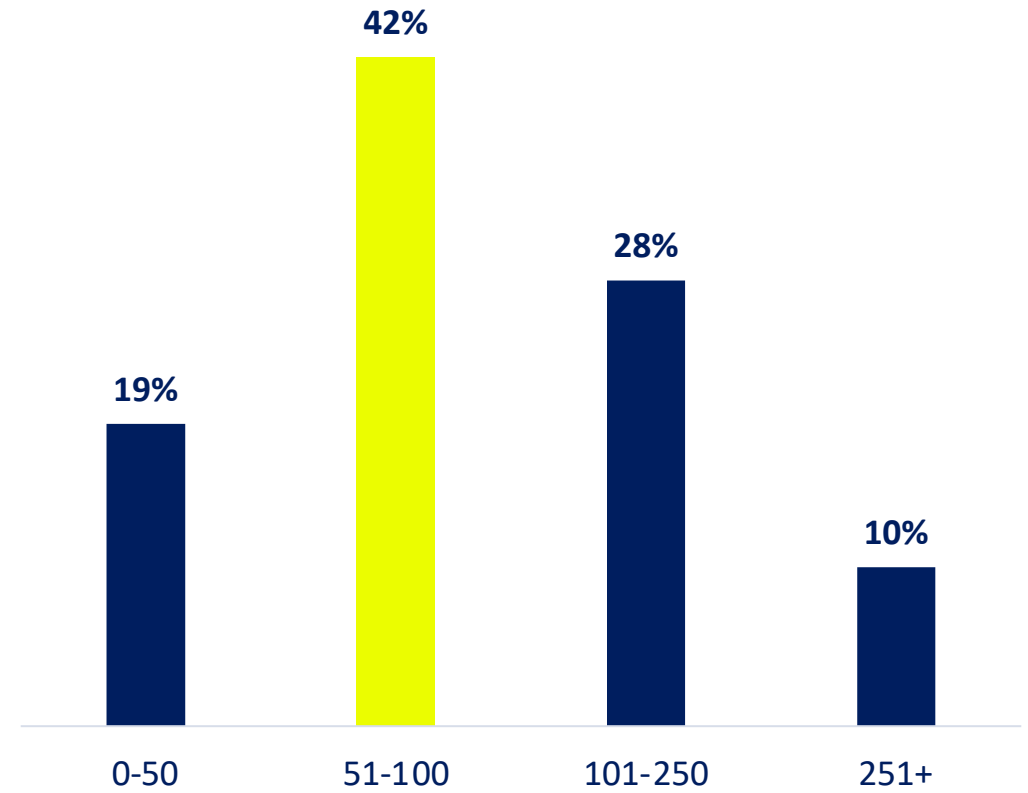
**2023**

On average, organizations have 77 automated processes currently in production



**2022**

On average, organizations had 120 automated processes in production



## How RPA estates were implemented

One important element this research aimed to uncover was how organizations started their automation journeys. Did they develop their RPA practice internally or look for outside help?

Only 25% of all organizations surveyed reported that their RPA program was developed internally with proprietary resources. Most organizations (41%) set up their RPA practice with external parties, and a significant percentage (34%) reported they used a combination of internal and external resources to implement automation.

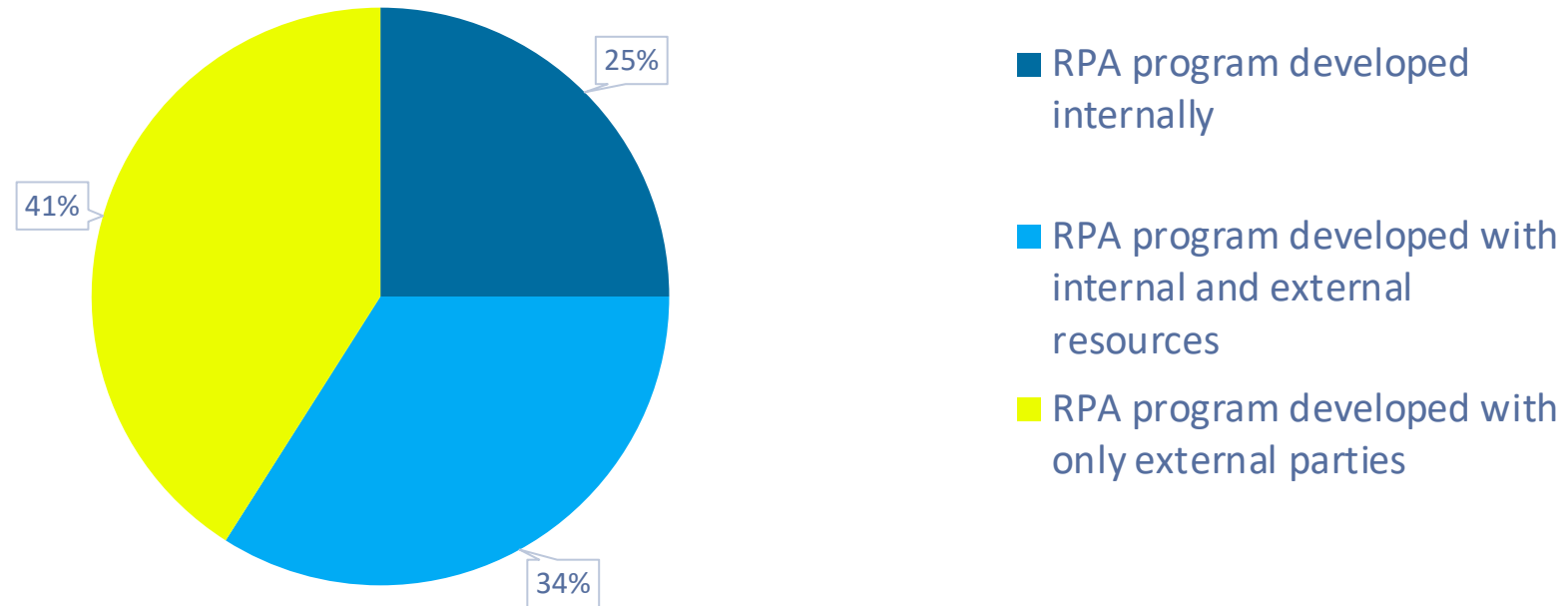
The organizations that reported they used external resources to implement RPA used multiple providers and vendors for the most part. Only 25% of companies used one third-party provider and 75% used 2-5 with the majority reporting that they employed at least 2 vendors for their RPA implementation.

Using service integrators and managed services is a common practice in automation from adoption to continuous implementation and delivery, right through to RPA migration.

**Most organizations (41%) set up their RPA practice with external parties, and a significant percentage (34%) reported they used a combination of internal and external resources to implement automation.**

# How RPA estates were implemented

Only 25% of all organizations surveyed reported that their RPA program was developed internally with proprietary resources. Most organizations (41%) set up their RPA practice with external parties, and a significant percentage (34%) reported they used a combination of internal and external resources to implement automation.



## The types of automations in different RPA estates – attended vs unattended

Another area of interest for this research was the type of automations organizations have in production.

Attended automations refer to automated processes that have to be manually triggered by employees. Attended automations still produce faster execution times, higher quality as a result of less errors being made, and greater efficiency, however human intervention is needed so that they're executed.

Unattended automations are automated processes that run automatically and complete an entire business task or process without any human intervention or trigger required.

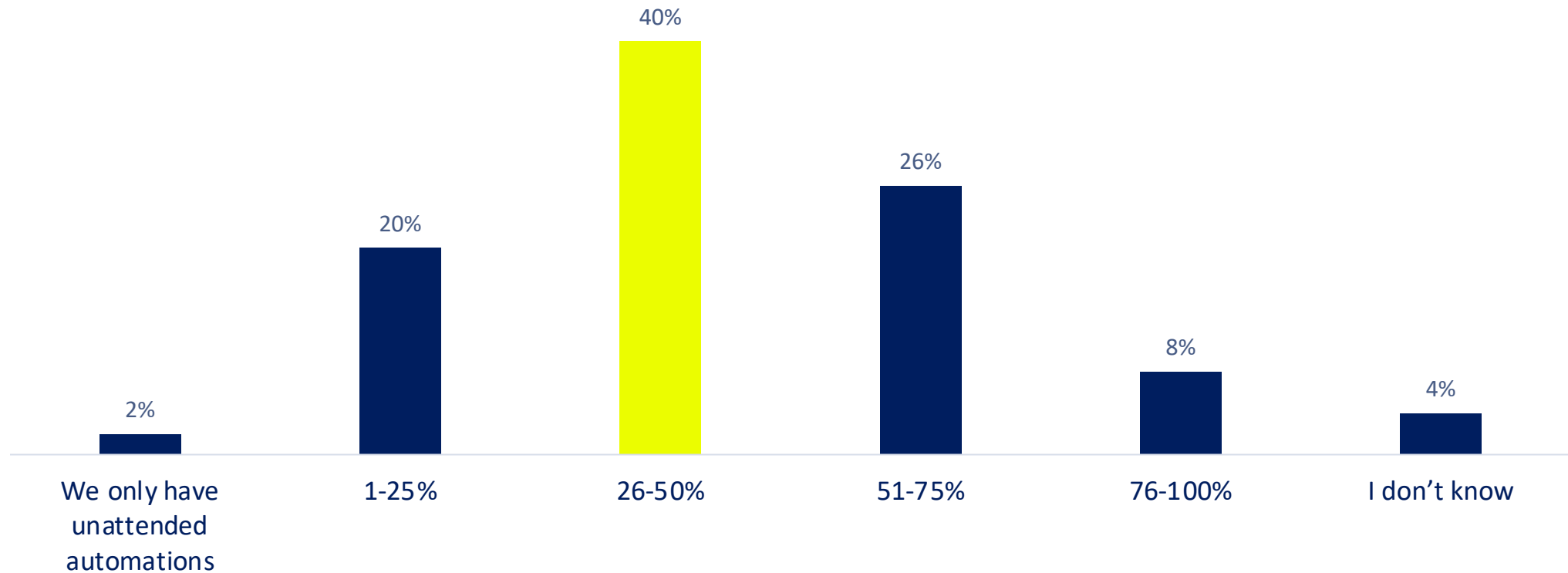
On average, 57% of RPA estates are made up of attended automations, but unattended automated processes are not far behind at 43%, suggesting there is value in both types of automations depending on the use case and the business task or process being automated.

**On average, 57% of RPA estates are made up of attended automations, but unattended automated processes are not far behind at 43%**

# The Types of Automations in Different RPA Estates – Attended vs Unattended

What percentage of your automated processes are attended automations?

On average, 57% of an organization's automated processes are attended automations



# The types of automations in different RPA estates

## – RPA vs Intelligent Automation

RPA is quickly giving way to its next iteration: intelligent automation.

Where RPA is the automation of simple, rule-based business tasks, intelligent automation combines different technologies – particularly artificial intelligence (AI) technologies such as machine learning, natural language processing, and computer vision – to automate more complex, end-to-end decision-based business processes.

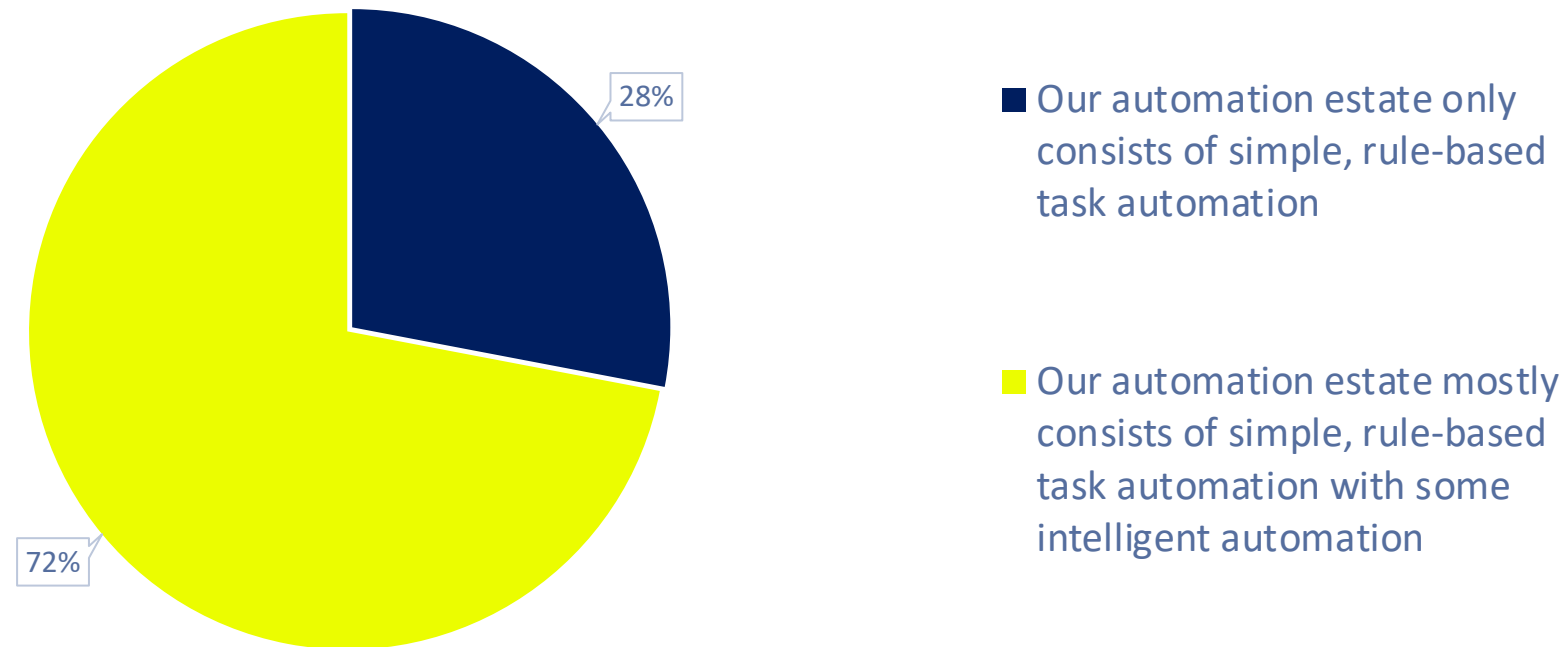
Still relatively a new technology, the assumption is that organizations are slowly experimenting and adopting intelligent automation but blanket implementation and adoption to eclipse RPA is some time away. The findings from our research support that assumption.

72% of organizations reported that their RPA estates contain mostly simple, rule-based task automation with some intelligent automation, indicating that the next iteration of automation is upon us but not quite ready to scale just yet.

**72% of organizations reported that their RPA estates contain mostly simple, rule-based task automation with some intelligent automation**

# The Types of Automations in Different RPA Estates – RPA vs Intelligent Automation

72% of organizations reported that their RPA estates contain mostly simple, rule-based task automation with some intelligent automation.





# 03

## RPA Governance

- The predominance of RPA Centers of Excellence (CoE)
- The average size of RPA Centers of Excellence (CoE)



# The predominance of RPA Centers of Excellence (CoE)

RPA Governance has continuously been a challenge that organizations struggle with. In Blueprint's 2022 research on the State of RPA, improving governance was the top objective organizations wanted to improve for their automation practice moving forward.

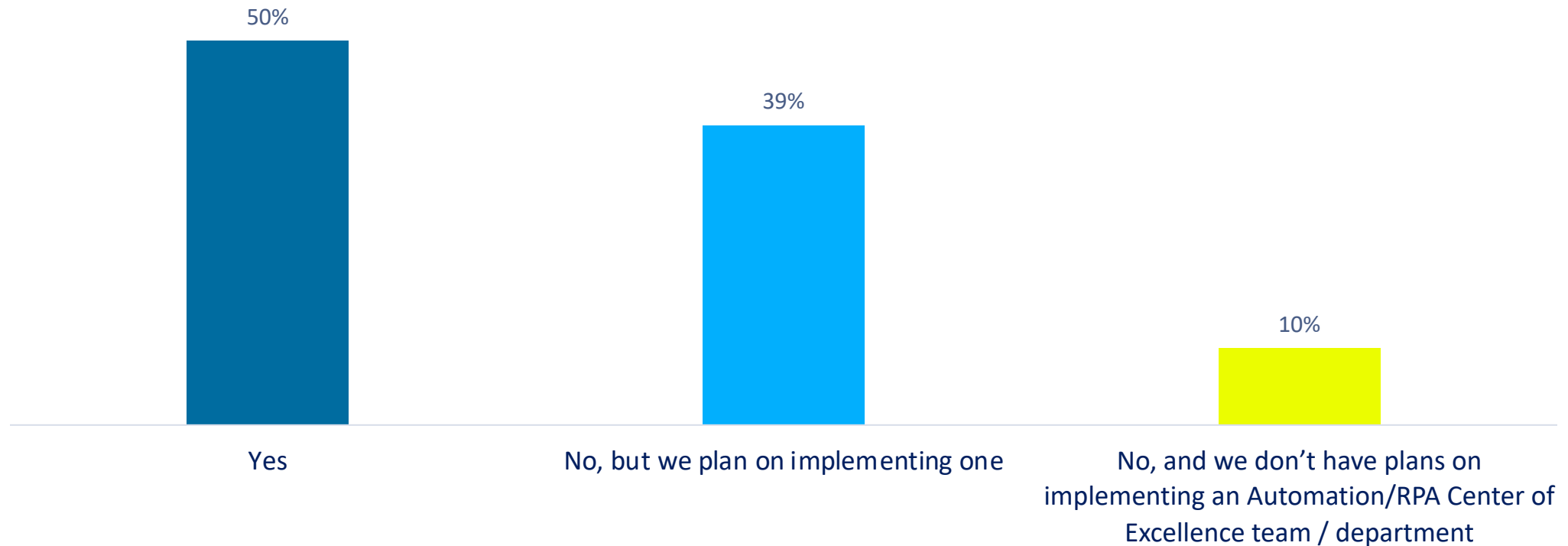
To implement a better governance model that prioritizes quality and speed of automation delivery to facilitate accelerated scale, best practices dictate that you should create and institute an RPA Center of Excellence (CoE).

RPA CoEs are cross-functional teams that identify, design, develop, and deploy automated processes as part of an organization's RPA initiative. They also maintain and monitor those automations to ensure they're delivering the business value they were meant to. They standardize, govern, and maintain automation best practices to ensure high quality and efficiency in automation delivery.

**50% of surveyed organizations reported they already have an RPA Center of Excellence and 39% confessed while they don't have one currently, they are planning to implement one**

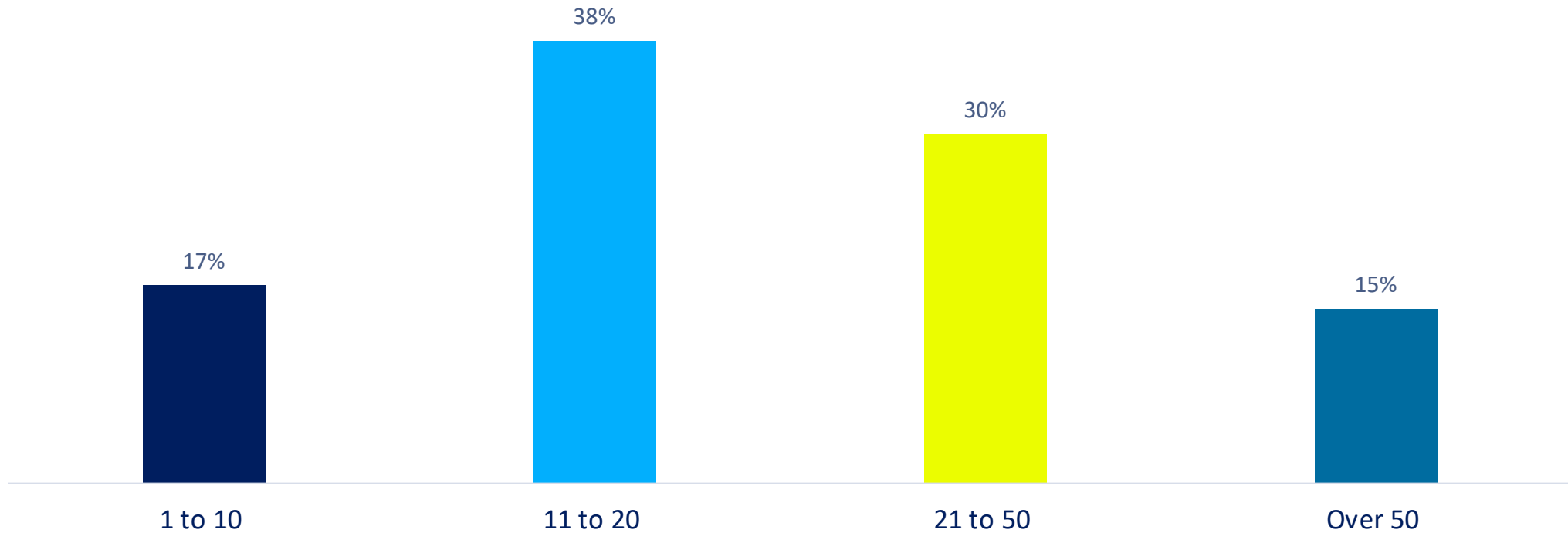
# The predominance of RPA Centers of Excellence (CoE)

According to Blueprint's 2023 research, 50% of surveyed organizations reported they already have an RPA Center of Excellence and 39% confessed while they don't have one currently, they are planning to implement one. These findings suggest companies have seen real value and returns when establishing a dedicated team to manage their automation programs.



# The average size of RPA Centers of Excellence (CoE)

In terms of the average size of RPA Centers of Excellence, on average, organizations reported that **20 employees** make up their automation CoEs. These roles include and aren't limited to developers, solution architects, business analysts, change managers, infrastructure engineers, support specialists, RPA champions/managers, and sponsors.



# 04

## RPA MANAGEMENT & TOTAL COST OF OWNERSHIP

- RPA budget holders & owners
- How much organizations spend on RPA annually



# RPA budget holders & owners

RPA has traditionally always had a strong IT presence. In terms of management and operations, IT's heavy involvement is logical. Even with rapid developments to next-generation intelligent automation platforms like Microsoft Power Automate that make automation design and delivery more accessible to the average businessperson, RPA remains a technical endeavor. Therefore, highly skilled technical resources that sit in companies' IT departments are depended on to manage and run automation practices.

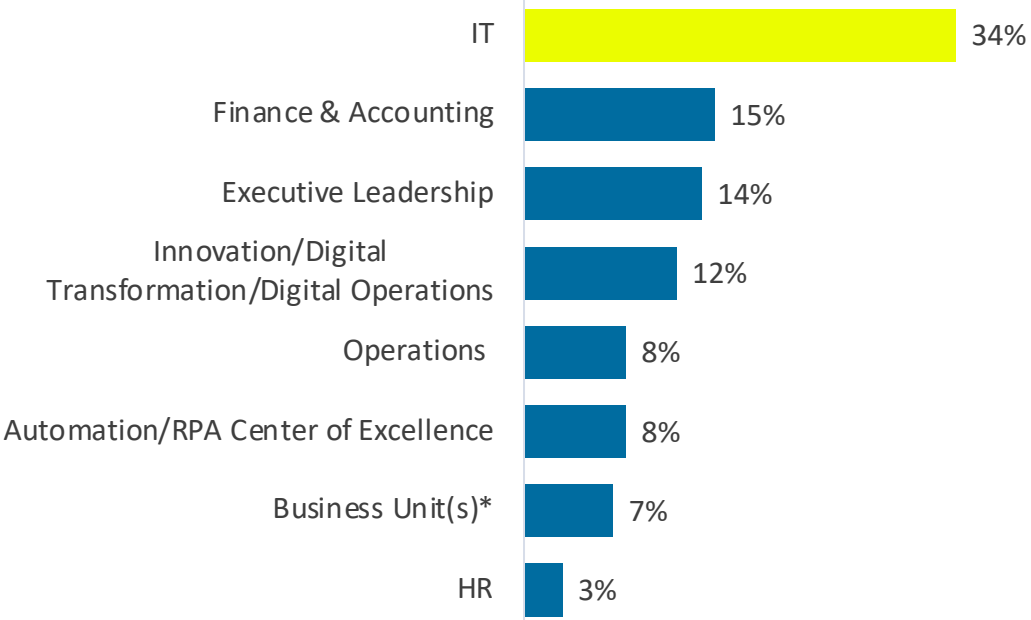
When asked who owns and manages the budgets for RPA in their organizations, 34% responded that the IT department was the owner. Unsurprisingly, Finance & Accounting were the next most likely owners at 15%. This again is fitting and mirrors Blueprint's 2022 findings – even though Finance & Accounting ownership has decreased – considering this department's role in managing operational budgets in addition to the wealth of RPA use cases that were most likely some of the first business tasks to be automated. Finance & Accounting has always been a common early adopter of RPA so naturally, their involvement and continued ownership remains strong.

**34% of respondents reported that the IT department owns and manages the budget for RPA in their organization**

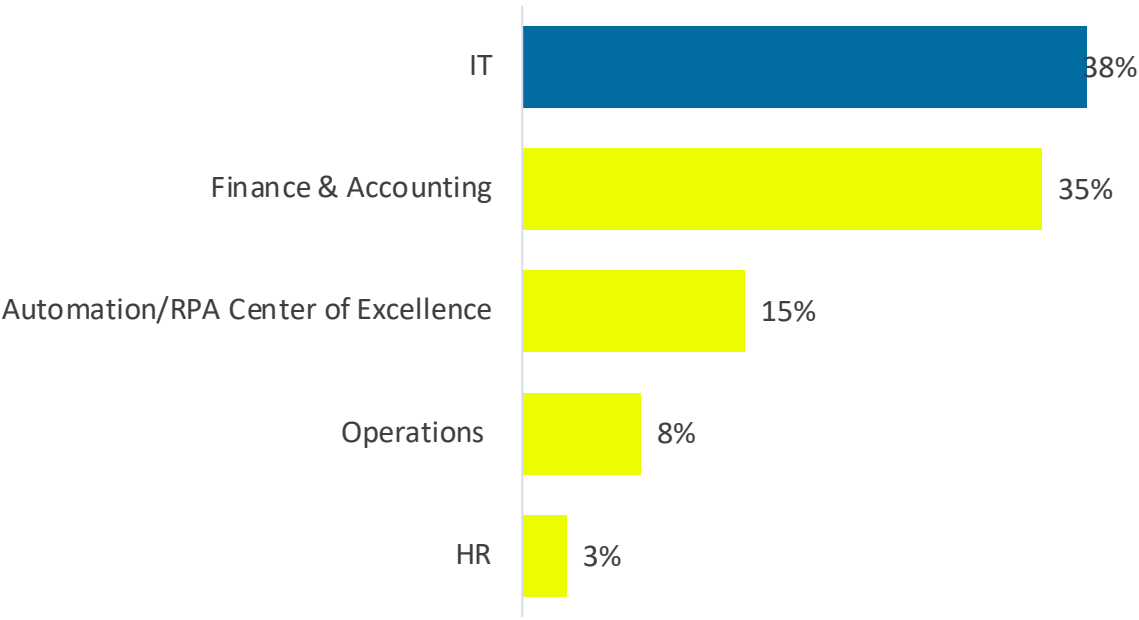
# RPA Budget Holders & Owners

A new entrant to the RPA ownership ranks is the Executive Leadership. One possible explanation could be that cost-reduction and increasing efficiency has become a top objective in the face of a volatile global economy, calling on executives to take a more hands on approach when it comes to automation and the benefits it offers.

2023



2022



# How much organizations spend on RPA annually

Annual investment in RPA remains strong in 2023 and has increased slightly from 2022. On average, organizations reported that they're spending roughly \$490,000 compared to \$480,000 in 2022.

While the difference is marginal, the increase in resources and investment are most likely due to a variety of factors that might include:

- Increased licensing fees from legacy RPA vendors
- Growing headcounts for RPA Centers of Excellence
- Added investment to increase returns realized from RPA
- Etc.

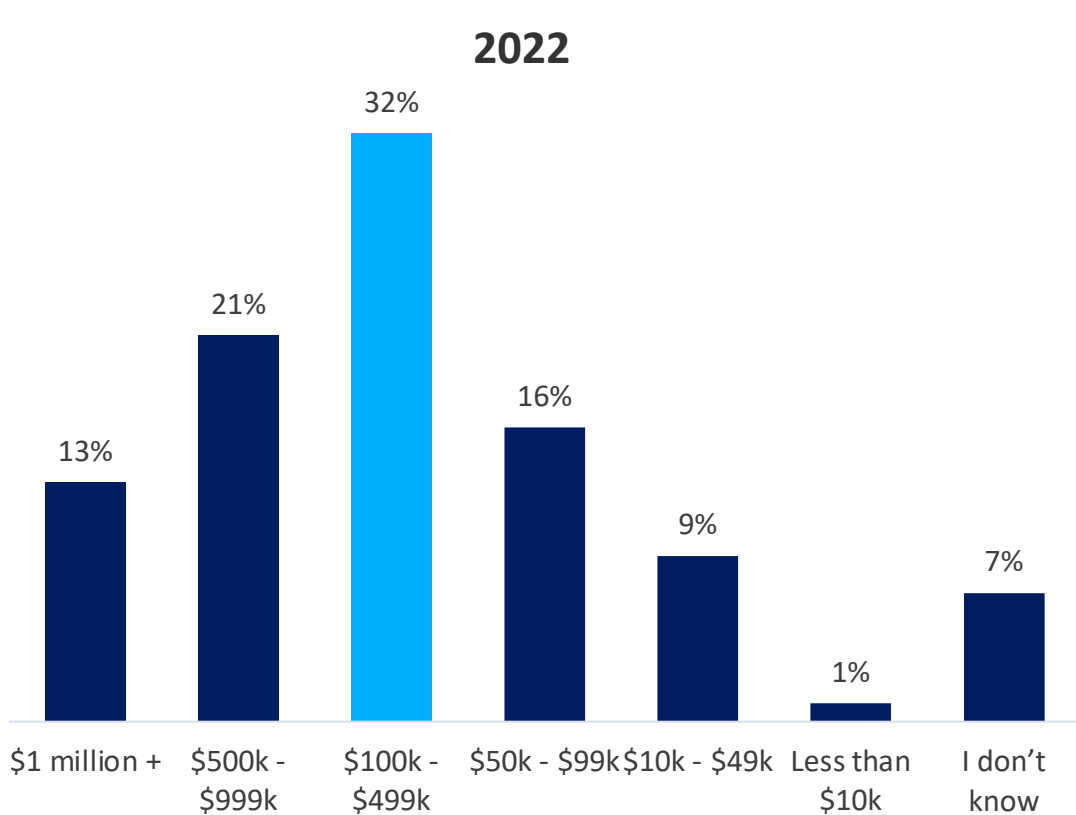
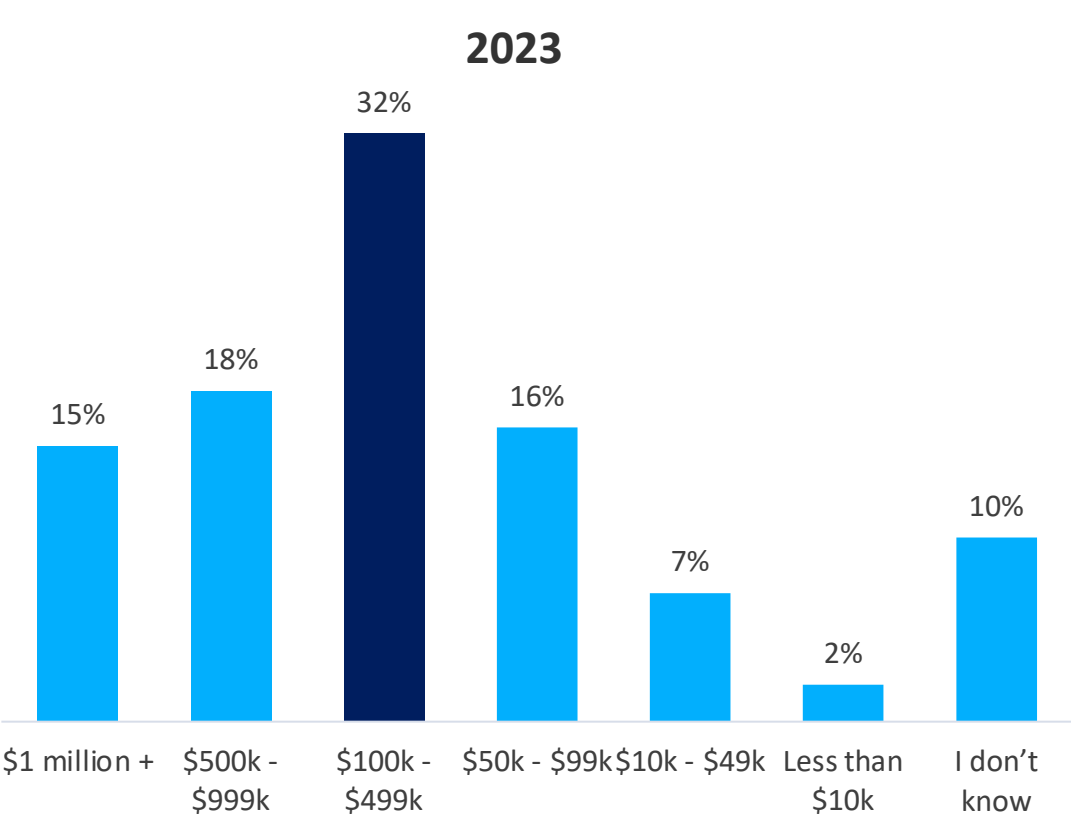
By country, the US is the highest spender compared to all those surveyed, investing an average of nearly \$600,000 annually to RPA. When considering organization size, companies with more than 5,000 employees spend above average on automation yearly at nearly \$550,000, suggesting enterprises remain the heaviest automation adopters and investors.

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# How much organizations spend on RPA annually

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# 05

## RPA TOOL USAGE

- The most used RPA platforms
- The percentage of organizations using a multi-platform strategy
- Why organizations choose to use a multi-platform strategy
- The percentage of organizations looking to migrate their RPA estates to new platforms



## The most used RPA platforms

Even though the RPA vendor market continues to grow with new entrants and legacy providers releasing new versions, the leaders at the head of the pack remain the same with Microsoft Power Automate continuing in the top spot with a sizeable lead.

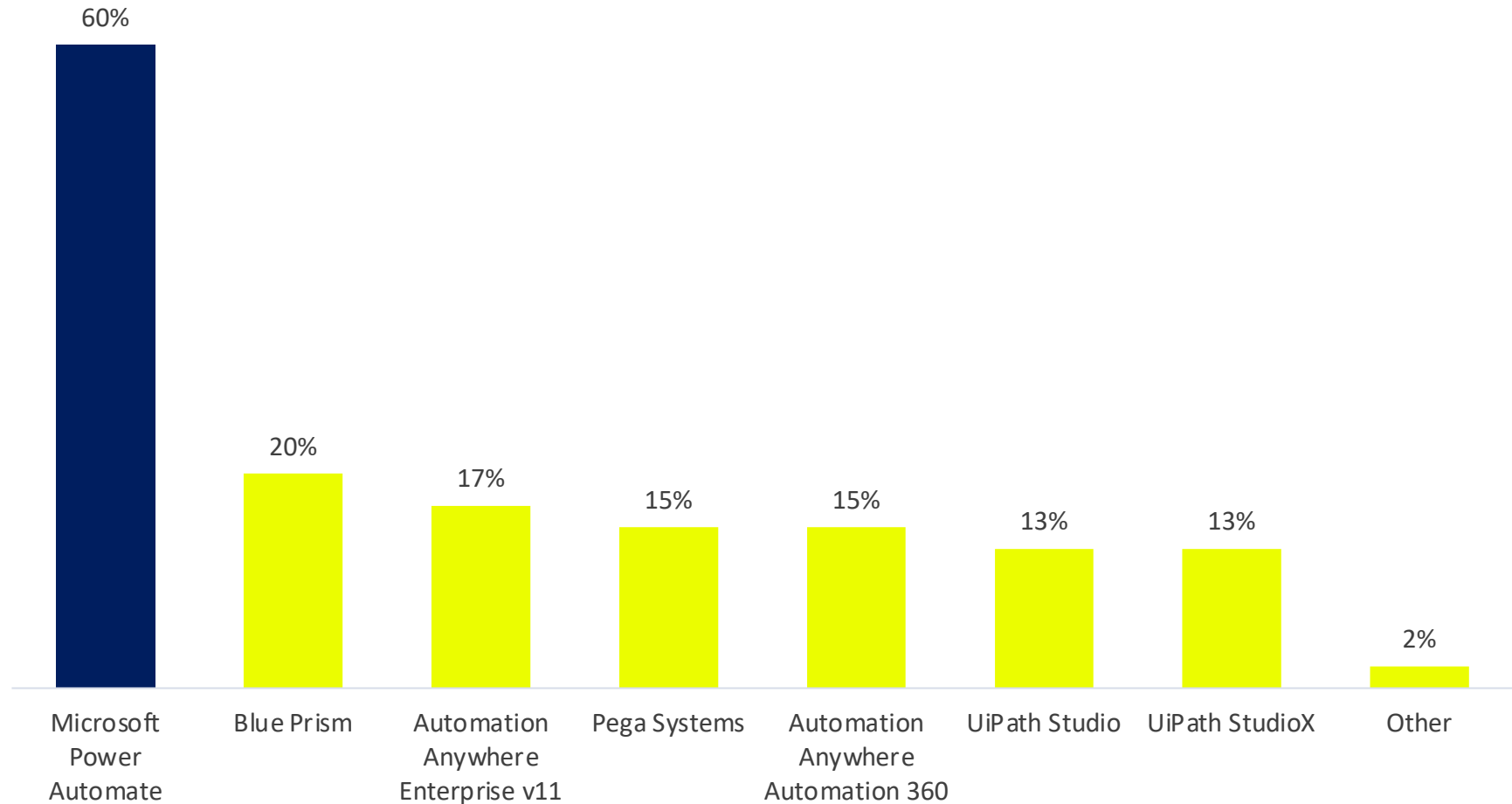
60% of organizations reported that they use Microsoft Power Automate, with Blue Prism in a distant second at 20% and Automation Anywhere v11 at 17%. Microsoft's rapid growth in popularity and overwhelming adoption is a testament to their significantly reduced barrier of entry, dramatically decreased licensing costs, ease of use, seamless compatibility with the rest of the Microsoft ecosystem of products, and product readiness.

Many predicted Microsoft Power Automate would rapidly provide stiff competition in the automation space and they were right.

**Microsoft Power Automate is the most commonly used RPA platform (60%)**

# The most used RPA platforms

**Microsoft Power Automate is the most commonly used RPA platform (60%)**



## The percentage of organizations using a multi-platform strategy

There is an assumption in the automation space that using a multi-platform strategy is not a best practice because of several factors. Multiple RPA tools increase licensing and operation costs. RPA platforms also specify process automations differently, so they need to be designed and coded differently, introducing complexities to standardization and governance.

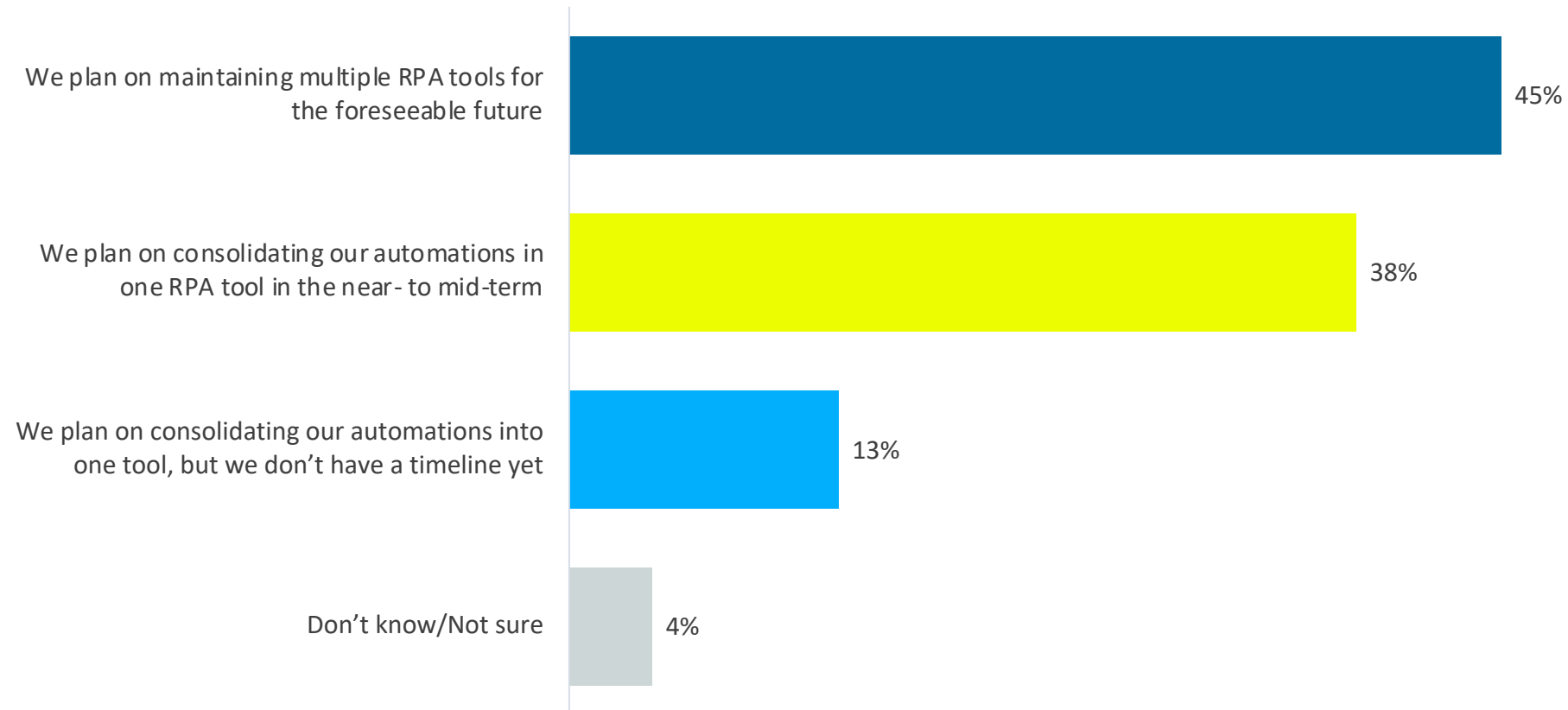
Even with all the challenges a multi-platform strategy presents, a large segment of organizations use multiple RPA tools in their automation practice. In 2023, 39% of the organizations surveyed reported that they use more than one RPA tool in their automation program. In 2022, that figure was 40% according to Blueprint's research.

38% of organizations on a multi-platform strategy plan on consolidating their RPA estates in one tool in the near- to mid-term and 13% plan on doing so without any concrete timeline in mind. However, 45% of companies using multiple RPA tools plan on keeping them for the foreseeable future, suggesting the challenges a multi-platform strategy presents hasn't deterred organizations from abandoning it. Perhaps the benefits or reasons a multi-platform strategy continues to remain consistent outweigh those challenges which we explore in the next section of this research report.

**39% of the  
organizations surveyed  
reported that they use  
more than one RPA  
tool in their  
automation program**

# The percentage of organizations using a multi-platform strategy

45% of organizations using multiple RPA tools plan on maintaining them for the foreseeable future



## Why organizations choose to use a multi-platform strategy

The reasons organizations use multiple RPA platforms mirrors the findings of Blueprint's 2022 research on the State of RPA.

The most common reason cited by organizations that use multiple RPA tools is due to compatibility with enterprise architecture (27%). For example, SAP's automation capabilities are used to automate business processes that interact with SAP.

Compatibility with enterprise architecture is a major benefit for organizations evaluating RPA tools. It's one of the reasons that explains Microsoft Power Automate's dominance considering Microsoft's sizeable footprint in all organizations globally. Compatibility is so strong, that it even compels companies to use multiple RPA tools for that specific reason.

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## Why organizations choose to use a multi-platform strategy

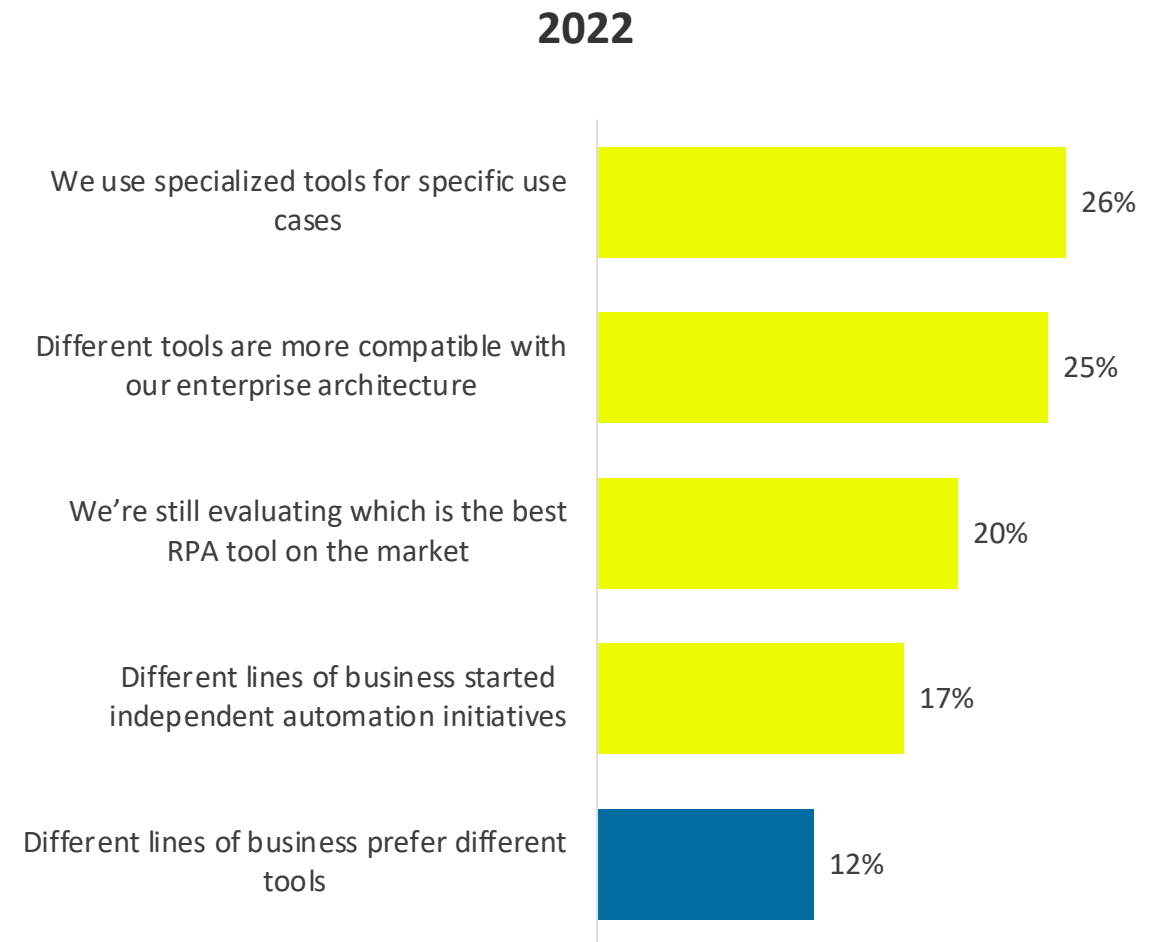
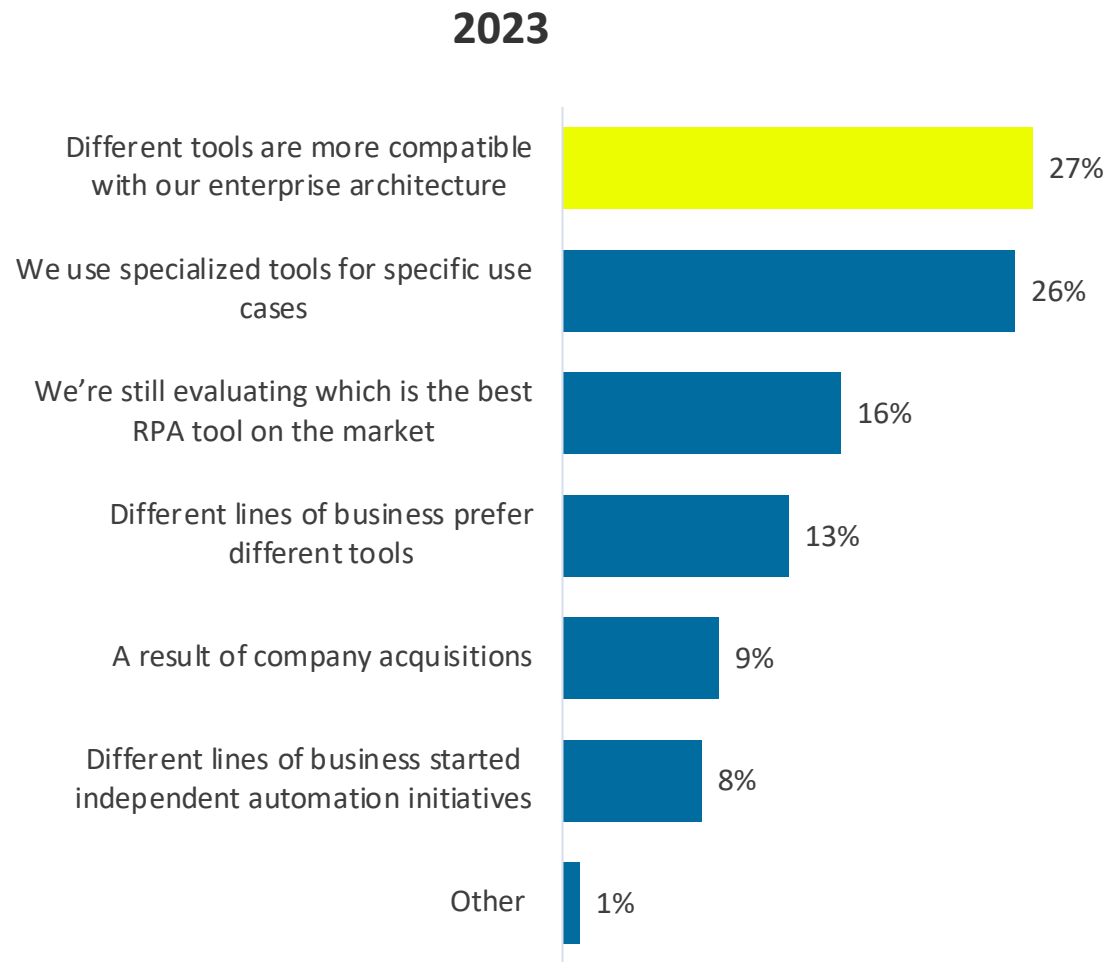
Use case also plays a major role in multi-platform strategies. 26% of organizations reported they use specialized RPA tools for different use cases. For example, Redwood might be used in these cases to automate finance processes which is their domain.

The remaining reasons organizations employ multiple RPA tools is down to the fact they're still evaluating RPA vendors or different lines of business started automation practices at different times or independently with a preferred tool. Acquisitions and mergers also factor into multi-platform strategies where independent organizations merge and find themselves using different RPA platforms in their automation practices.

**Use case also plays a major role in multi-platform strategies. 26% of organizations reported they use specialized RPA tools for different use cases**



# Why organizations choose to use a multi-platform strategy



## The percentage of organizations looking to migrate their RPA estates to new platforms

With some RPA vendors raising licensing costs for tools that are incredibly complex to work in and others like Microsoft Power Automate offering both a much more cost-effective price-point and a user experience that facilitates citizen development, there is a rapidly growing interest in switching RPA tools.

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.

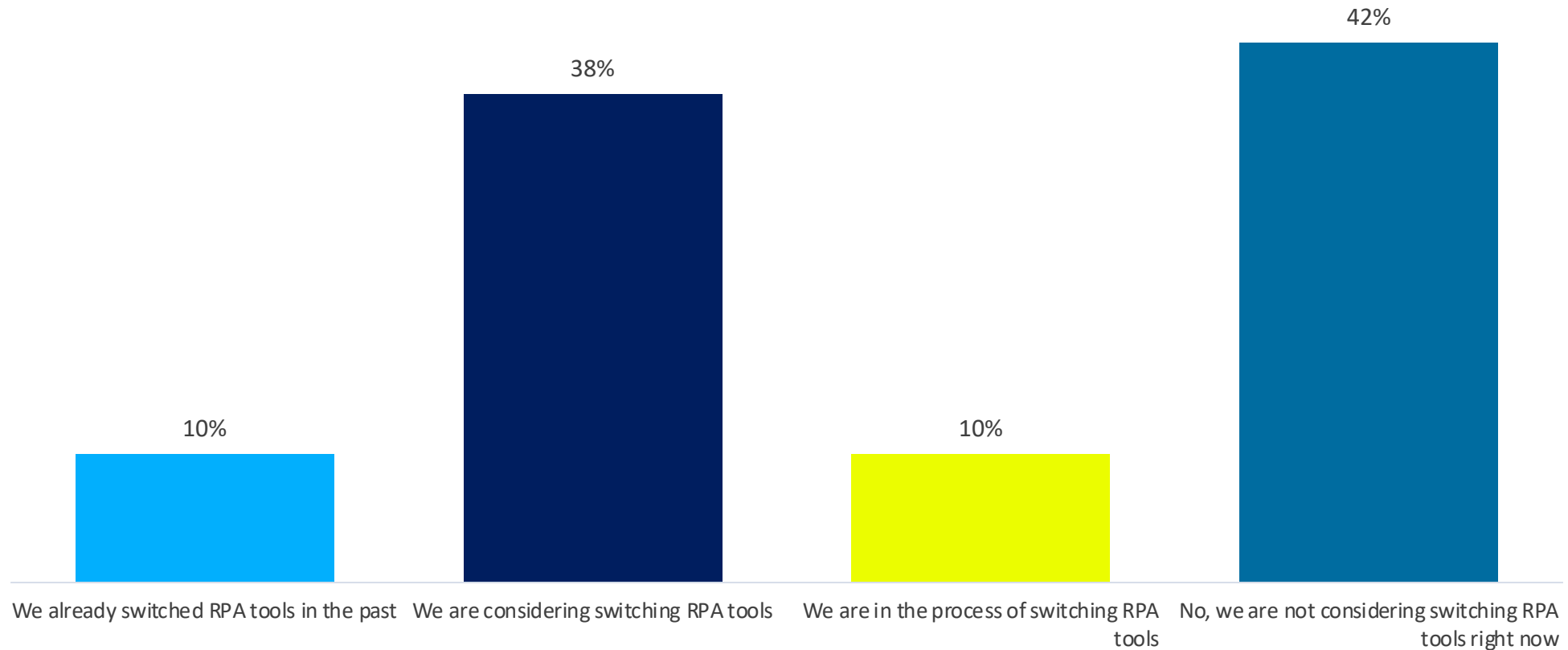
While RPA migrations are still considered very challenging, time-consuming, and expensive, as organizations realize there are RPA migration solutions available that drastically reduce the time, effort, and complexity of migrating RPA estates, the segment of organizations switching vendors will only increase.

For more in-depth insight and analysis on RPA migrations, download Blueprint's research report on [The State of RPA Migrations in 2023 here](#).

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# The percentage of organizations looking to migrate their RPA estates to new platforms

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# 06

## RPA TOOLCHAINS

- The number of tools organizations have in their RPA toolchains
- The proportion of organizations using process discovery tools



## The number of tools organizations have in their RPA toolchains

RPA platforms are typically where automations are designed, developed, deployed, and monitored. That constitutes only one fundamental element of an RPA toolchain.

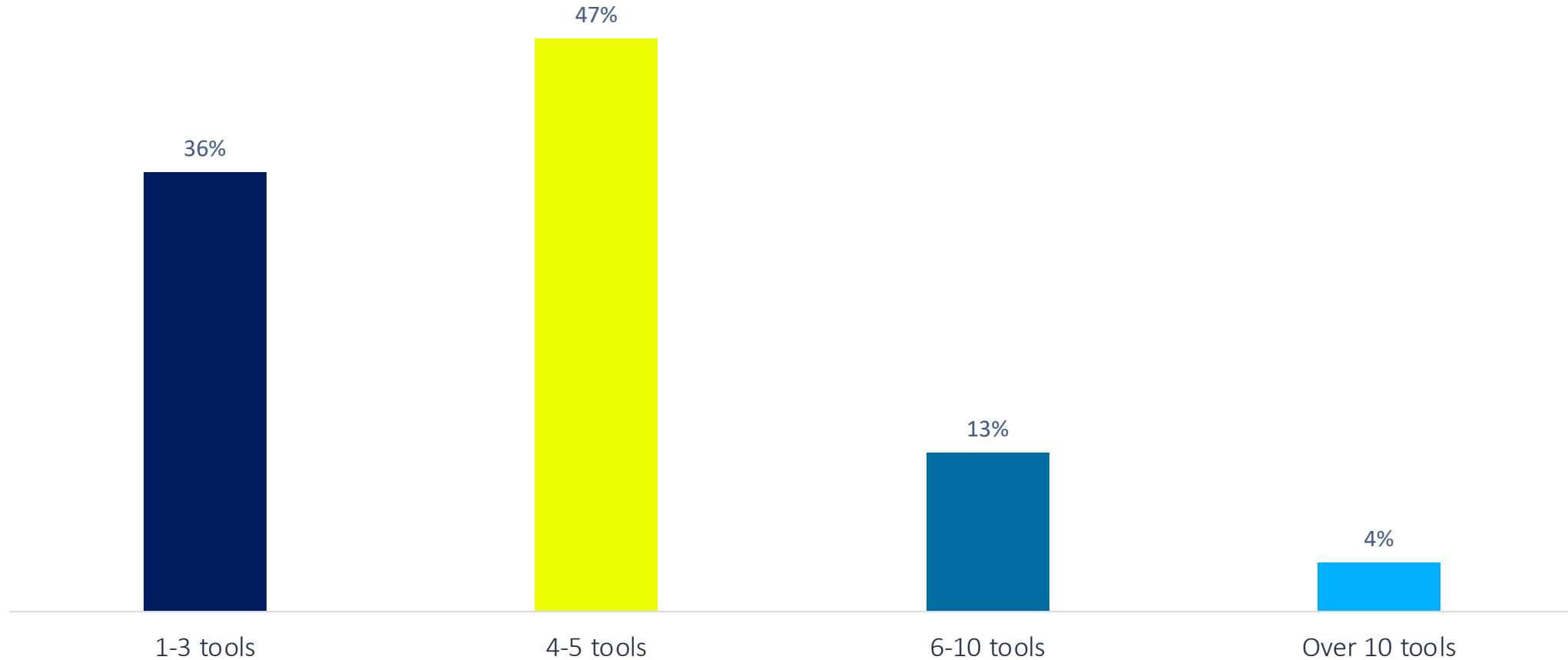
Organizations have quickly realized that they need to augment their automation tech stack with other technologies like process discovery tools that facilitate scale and increase the quality of the automations being delivered.

On average, organizations reported that they have 5 tools in their automation tech stack. Those tools might include but are not limited to RPA platforms themselves, ALM tools like Jira to manage the work being done, and a mix of process discovery tools like process capture, task mining, or process mining tools.

**On average,  
organizations reported  
that they have 5 tools  
in their automation  
tech stack**

# The number of tools organizations have in their RPA toolchains

On average, organizations have around 5 tools in their automation tech stack



## The proportion of organizations using process discovery tools

A key component of any automation toolchain are process discovery tools that enable organizations to define their business processes, and more importantly, identify viable and high-value automation candidates.

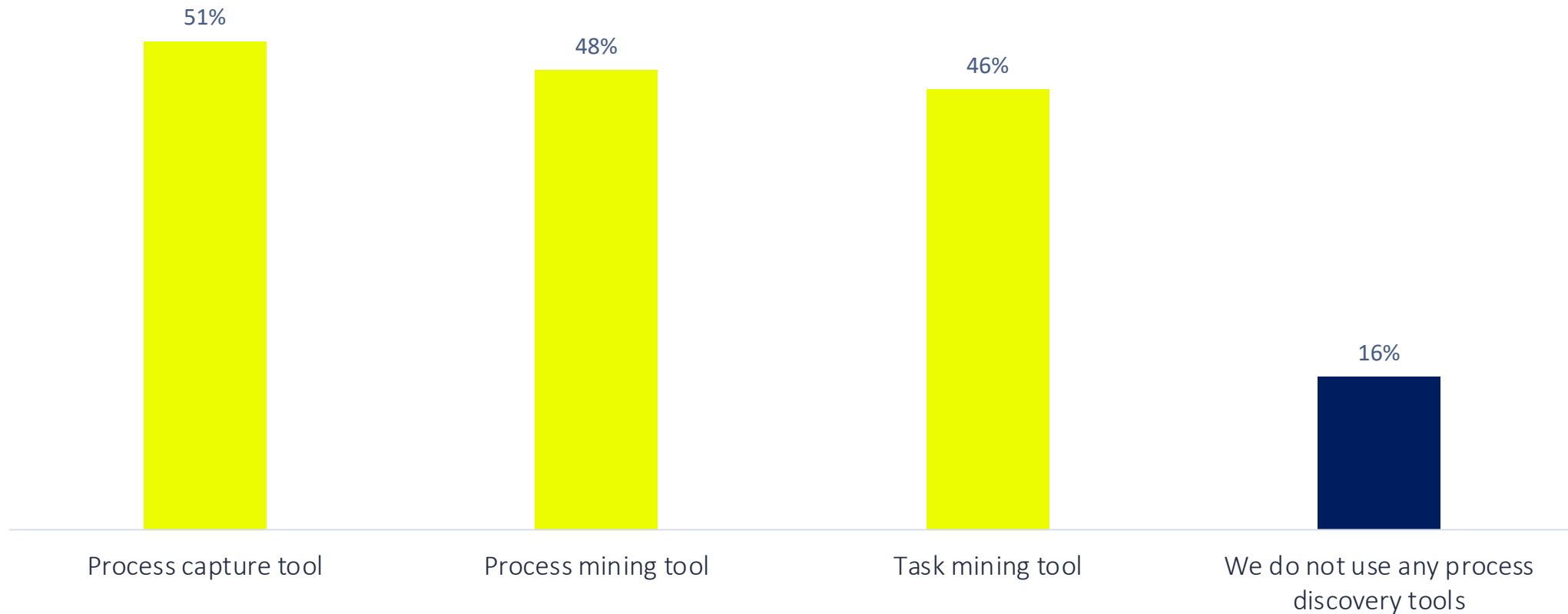
Process discovery tools include process capture, task mining, and process mining tools. Some RPA vendors have bundled these essential technologies right into their offering, just like Microsoft Power Automate Process Mining that mines an organization's event logs to identify business processes. Power Automate Process Mining also uses AI to present recommendations on how to improve those processes and which ones should be automated with Power Automate.

The vast majority of organizations reported that they use a variety of process discovery tools. 51% reported they use a process capture tool. 48% claimed they employ a process mining tool, and 46% confirmed that a task mining tool is used in their automation tech stack. Only 16% reported that they did not use any process discovery tools, suggesting organizations are seeing justifiable returns and results by using these technologies in their automation practice.

**51% reported they use a process capture tool. 48% claimed they employ a process mining tool, and 46% confirmed that a task mining tool is used in their automation tech stack.**

# The proportion of organizations using process discovery tools

Half (51%) of organizations use a process capture tool





# 07

## FUTURE PLANS

- What organizations are prioritizing for their RPA programs in the future



# What organizations are prioritizing for their RPA programs in the future

Judging by the level of investment, size of RPA teams, and growing automation headcounts, organizations are realizing significant returns from their RPA programs, however there are clear gaps and areas for improvement.

When asked what their future areas of improvement and objectives are for their RPA programs, the most common answer reported was applying automation to more areas of the business (39%) and achieving scale (35%). This is a clear indication that the returns companies have experienced are significant and wider implementation is desired to amplify that ROI.

**Applying automation to more areas of the business (39%) and achieving scale (35%) are the most prioritized objectives for RPA programs moving forward**

# What organizations are prioritizing for their RPA programs in the future

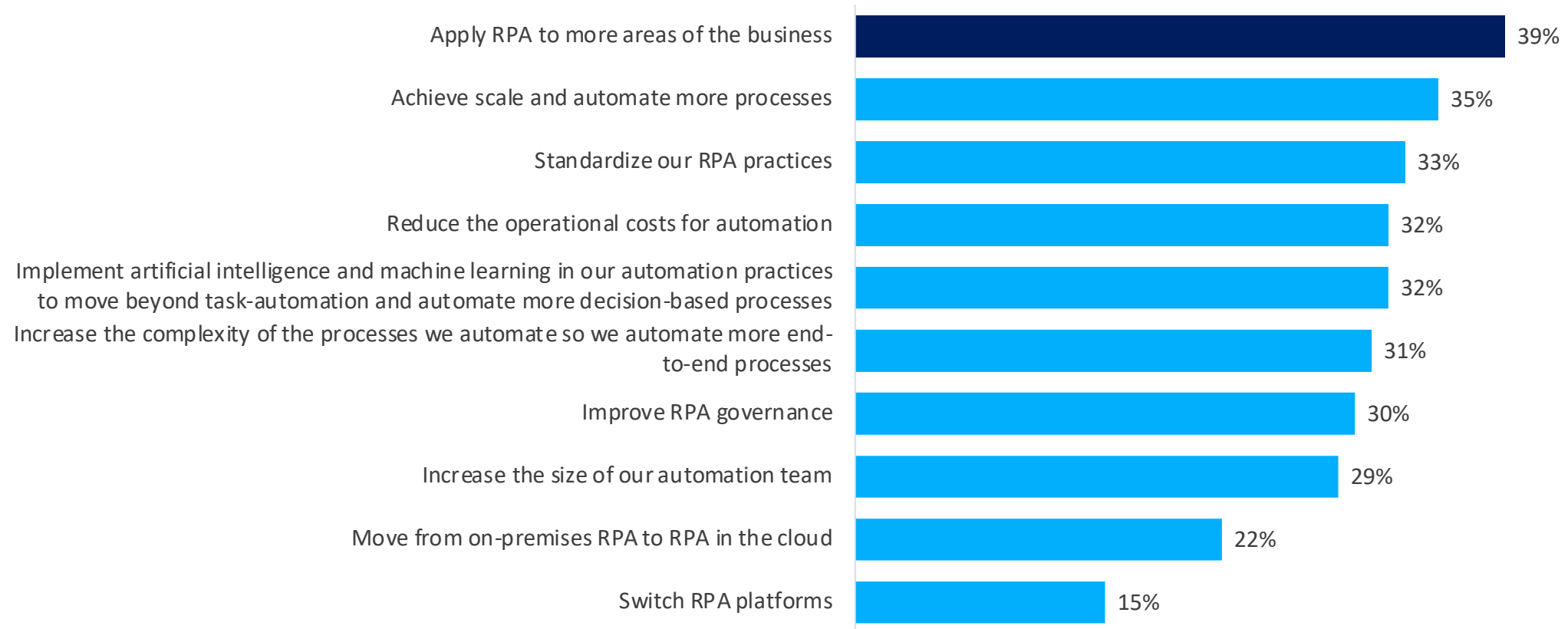
Standardization, better governance, and implementing more intelligent automation by automating complex, end-to-end business processes were also highly reported future objectives.

Unsurprisingly, reducing the total cost of ownership for automation was a very high priority. A contracting economy in 2023 combined with rising licensing costs for legacy RPA tools and more cost-effective options like Microsoft Power Automate available have done their part to raise this objective for all automation programs across industries, fueling RPA migrations for now and years to come.

**Reducing the total cost of ownership for automation was a very high priority**

## What organizations are prioritizing for their RPA programs in the future

Applying RPA to more business areas (39%), achieving scale and automating more processes (35%), standardization (33%), and reducing automation costs (32%) are the main future RPA plans for organizations



08

CONCLUSION



blueprint

# The state of RPA in 2023: Conclusion

With the challenges of the last few years, businesses worldwide have prioritized increased efficiency and cost-reductions, leaning heavily on automation as one way to deliver on those objectives.

RPA estates have reportedly gotten smaller, however that is most likely a result of tightening up automation practices and reducing waste, redundancies, and ineffective automations delivering underwhelming returns.

There is a greater emphasis on specialized, centralized teams to manage automation in the form of RPA Centers of Excellence (CoE) and Microsoft Power Automate continues its upwards trajectory on the leaderboard as the most used

RPA tool—a consequence of its simplified ease of use and very competitive pricing.

RPA toolchains have evolved in sophistication as organizations aim to scale and apply automation to more areas of the business, however the desire to switch RPA platforms to reduce the total cost of ownership for RPA and make design and delivery more accessible to the average business user is stronger than ever.

With RPA migration solutions like Blueprint that radically reduce the complexity, effort, and cost of migrating, the motivation to switch vendors to providers that better fit business needs and objectives will only increase. For more information, visit [www.blueprintsys.com/rpa-migration](https://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



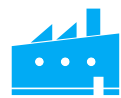
- 14% of respondents held Owner / C-suite level positions
- 39% of respondents held Senior Manager / Head positions
- 18% of respondents held VP / Director positions
- 27% of respondents held Analyst / Manager positions
- 3% of respondents held Developer positions

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

## RPA estates have gotten more efficient

Year over year, RPA estates have gotten slightly leaner. That is most likely a result of increased learning and overcoming growing pains.

In the rush to automate anything and everything, waste and redundancy were generated. The waste and ineffective process automations have now been removed. What remains in production are the automations delivering significant value.

02

## RPA's annual investment is increasing

Though marginal, RPA's annual spend increased in 2023 to \$490,000, indicating that RPA initiatives are still enjoying strong support and sponsorship based on the results they've delivered.

By country, the US has the highest level of investment with \$600k spent on automation annually.

03

## Microsoft leads the way once again

Microsoft Power Automate was once again the most used automation platform. With incredibly cost-effective pricing, compatibility with the rest of the Microsoft ecosystem, its ease of use, and new advancements like the addition of Microsoft Power Automate Process Mining, this figure has the potential to increase in coming years.

04

## Automation toolchains are evolving

On average, organizations employ 5 tools in their automation toolchains. Besides an RPA execution tool to design, develop, deploy, and monitor automated processes, process discovery tools are very common in RPA tech stacks.

51% reported they use a process capture tool. 48% claimed they employ a process mining tool, and 46% confirmed that a task mining tool is in their RPA toolchain, suggesting identifying automation candidates to fuel scale is a widely used strategy.

05

## Scale is the next frontier

The returns organizations have experienced from their automation practices have been significant. So much so that applying automation to more areas of the business and scaling remain the biggest objectives.

Reducing the total cost of ownership for RPA is also a major goal. A declining economy and rising licensing costs have fuelled cost reduction for automation and with much more cost-effective options like Microsoft Power Automate, that objective is very much attainable.

# blueprint<sup>®</sup>

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.

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