Zinnov Zones 2019

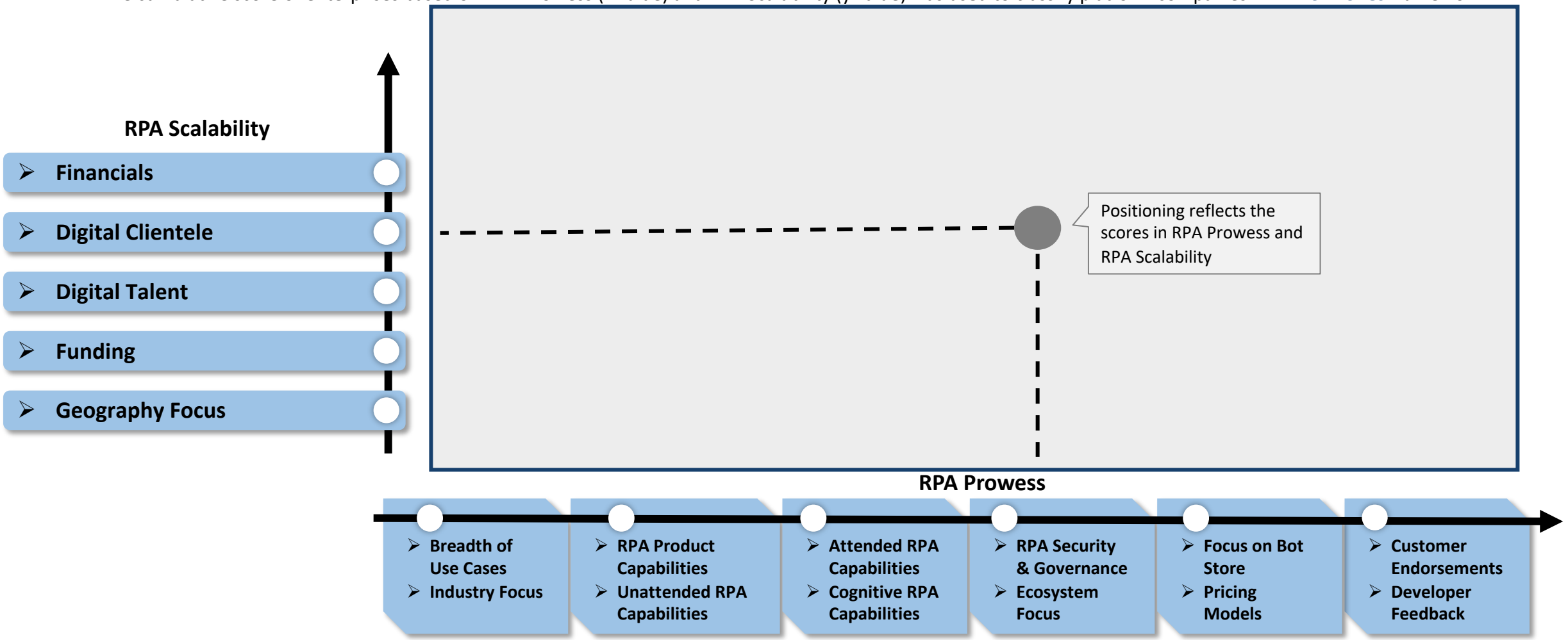
RPA Platforms

Zinnov Zones for RPA Platform 2019: Framework

Zinnov evaluated participating RPA Platform companies on two key areas basis which they were plotted on a 2-dimensional graph

1 **RPA Prowess** 2 **RPA Scalability**

The cumulative score of enterprises based on RPA Prowess (x value) and RPA Scalability (y value) was used to classify platform companies in **Zinnov Zones** framework



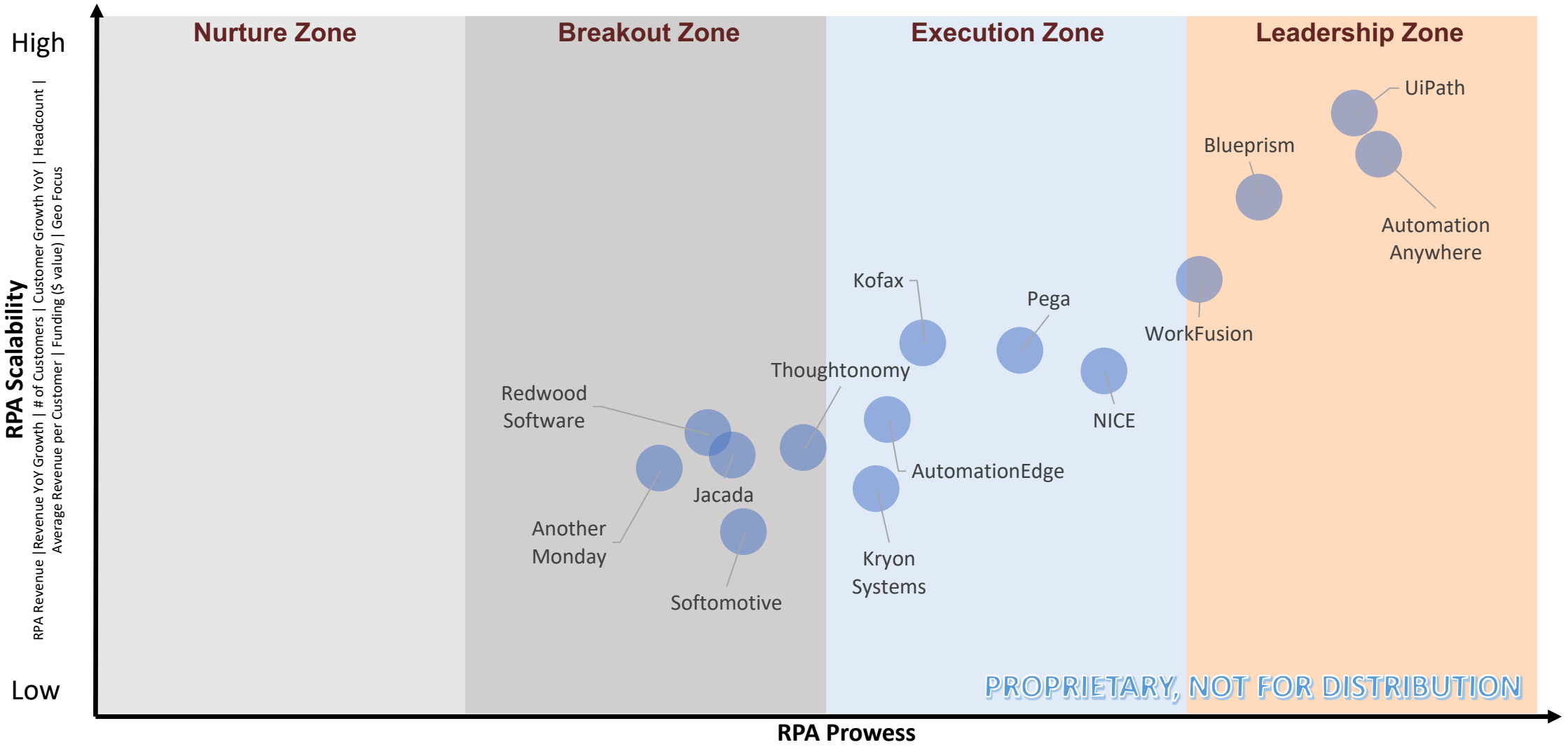
Zinnov Zones for RPA Platforms – Segments

1 Overall RPA	• Assessed the overall RPA prowess and scalability of the participants; key parameters include product capabilities, breadth and depth of use cases, ecosystem focus, and capabilities across the four segments: Unattended RPA, Attended RPA, Cognitive RPA, and Security and Governance
2 Unattended RPA	• Assessed the unattended RPA focus and capabilities of the participants; key parameters include revenue share from unattended, breadth and depth of use cases, among others • Unattended RPA involves bots working remotely without any human interaction and are typically used for back office processes
3 Attended RPA	• Assessed the attended RPA focus and capabilities of the participants; key parameters include revenue share from unattended, breadth and depth of use cases, among others • Attended RPA includes bots that work alongside humans and are typically used for front office processes
4 Cognitive RPA	• Assessed participants on their native cognitive capabilities, partnership with commercial players, focus on IPs and cognitive use cases. Cognitive capabilities assessed comprises AI/ML, OCR, NLP/NLG, chatbots, etc.
5 Security & Governance	• Assessed end to end security & governance capabilities of RPA platforms, including identity and access management, infrastructure security, information security and governance

Source: Data shared by participant companies, Zinnov Research & Analysis

Zinnov Zones for RPA Platforms: Overall Ratings

Zinnov Zones for RPA Platforms – Overall

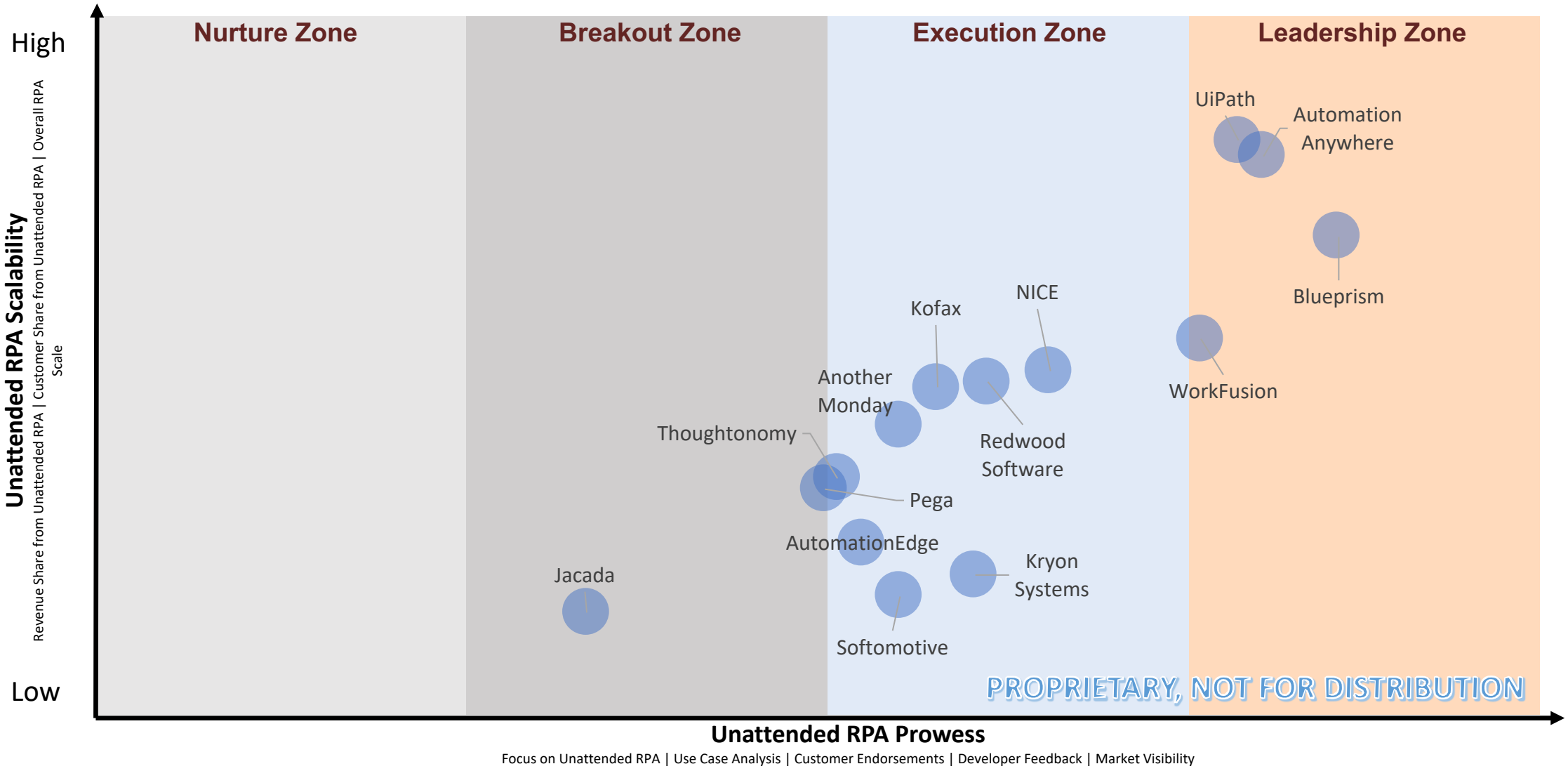


Breadth of Use Cases | Industry Focus | RPA Product Capabilities(Ease of Use, Ease of customization, Scalability, Ease of deployment, Quality of support) | Unattended RPA Capabilities | Attended RPA Capabilities | Cognitive RPA Capabilities | RPA Security & Governance | Ecosystem Focus(Service Providers, Technology Partners, Developers, Start-ups) | Focus on Bot Store/Marketplace | Pricing Model | Customer Endorsements | Developer Feedback

Source: Data shared by participant companies, Zinnov Research & Analysis

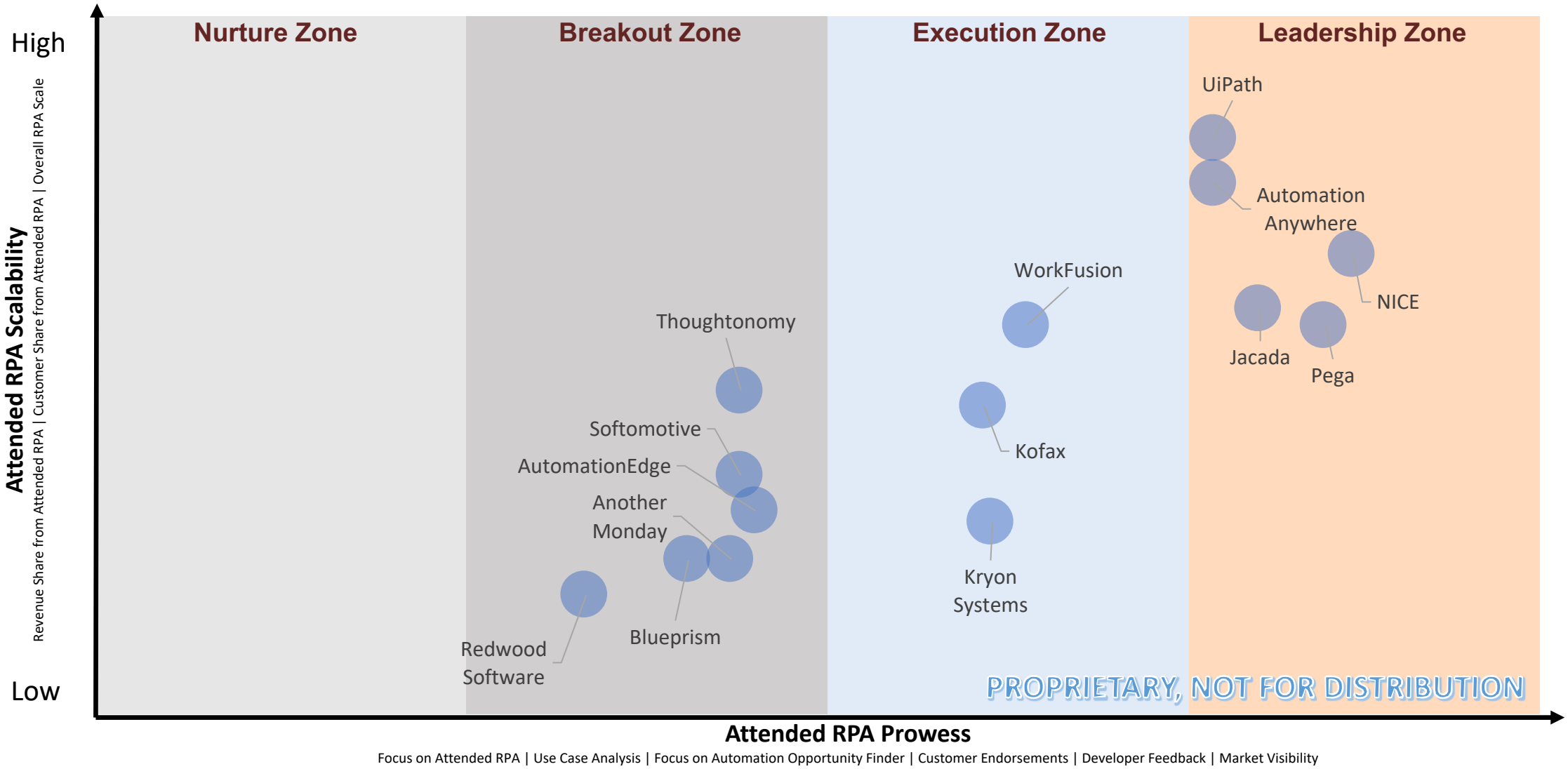
Zinnov Zones for RPA Platforms: Segment-wise Ratings (1/4)

Zinnov Zones for RPA Platforms – Unattended RPA



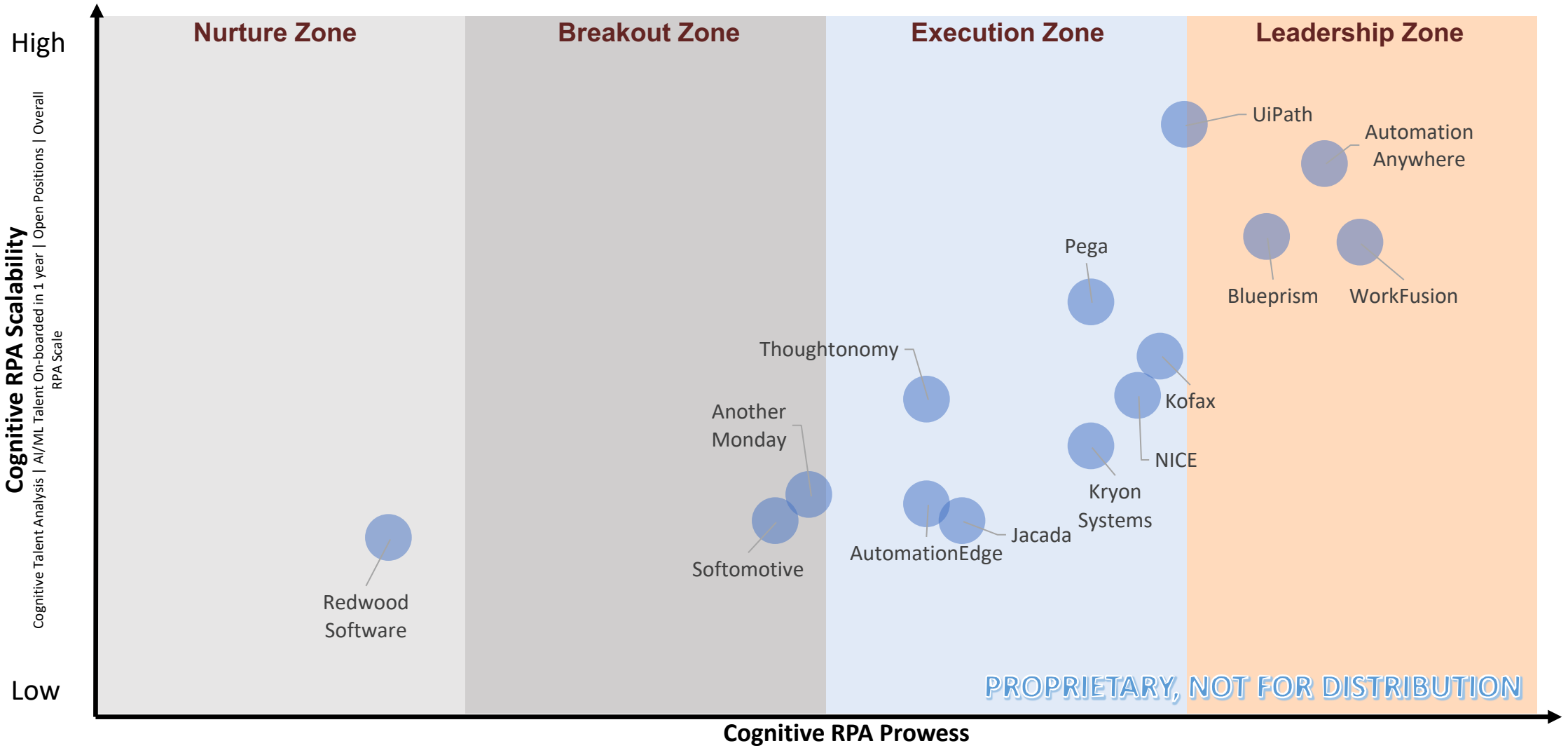
Zinnov Zones for RPA Platforms: Segment-wise Ratings (2/4)

Zinnov Zones for RPA Platforms – Attended RPA



Zinnov Zones for RPA Platforms: Segment-wise Ratings (3/4)

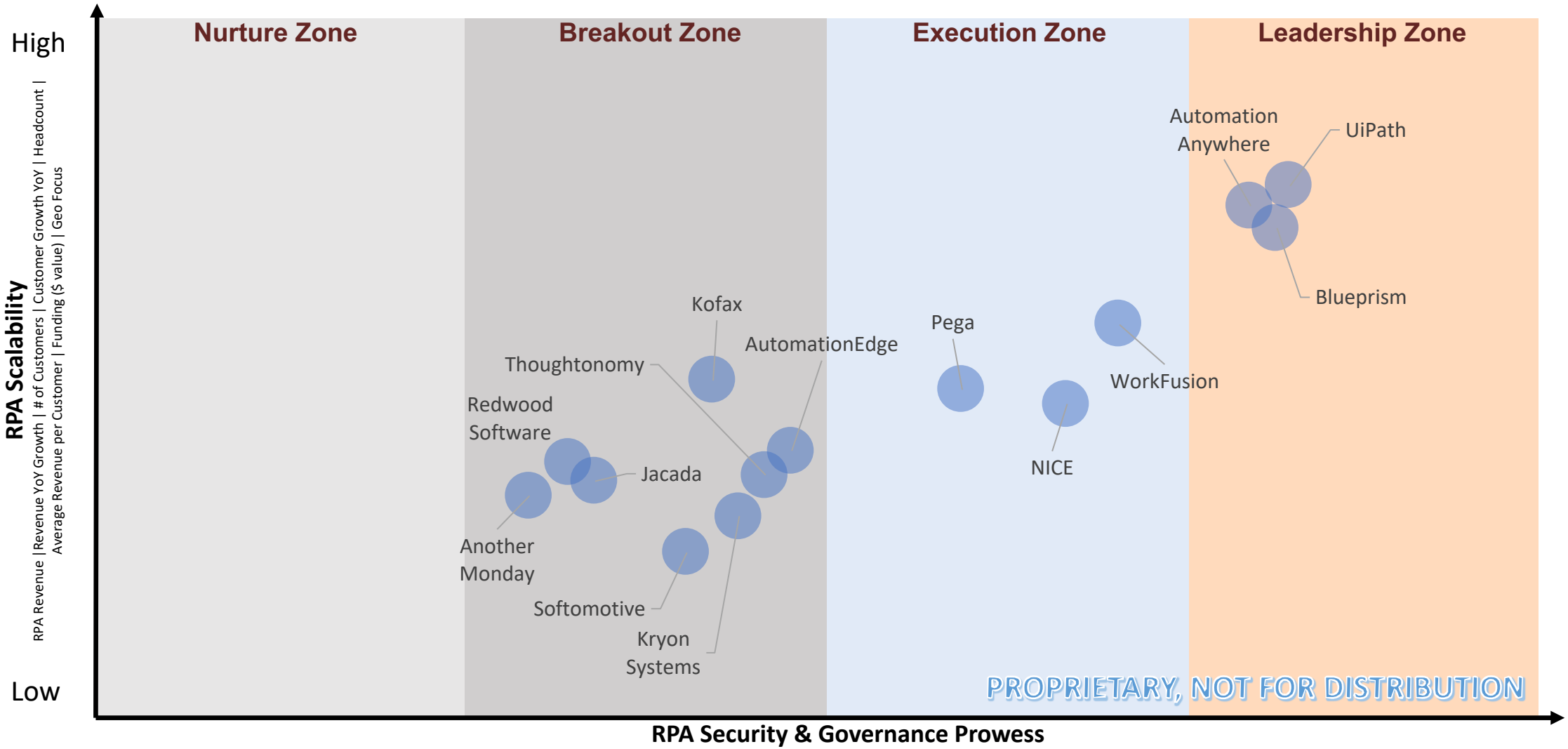
Zinnov Zones for RPA Platforms – Cognitive RPA



Focus on Native Cognitive Computing capabilities (AI/ML, NLP/NLG, Computer Vision/Computer Audition, OCR, Chatbots) | Use Case Analysis | Focus on Cognitive Technology Partnerships | Cognitive related IP/Patents filed | Customer Endorsements | Developer Feedback | Market Visibility

Zinnov Zones for RPA Platforms: Segment-wise Ratings (4/4)

Zinnov Zones for RPA Platforms – Security & Governance



Identity & Access Management – IAM (Privileged Access Management, Role Based Access Control – RBAC, Credentials Vault, RSA Keys) | Infrastructure Security (Application/SDLC level Security/DevSecOps, AES Encryption, TLS Protocol) | Information Security/ISO27001 | Governance (Bot Audit Trails, Bot Control Rooms) | Domain Skills | Customer Endorsements | Developer Feedback | Market Visibility

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