IDC MarketScape

IDC MarketScape: Worldwide Business Automation Platforms 2025 Vendor Assessment

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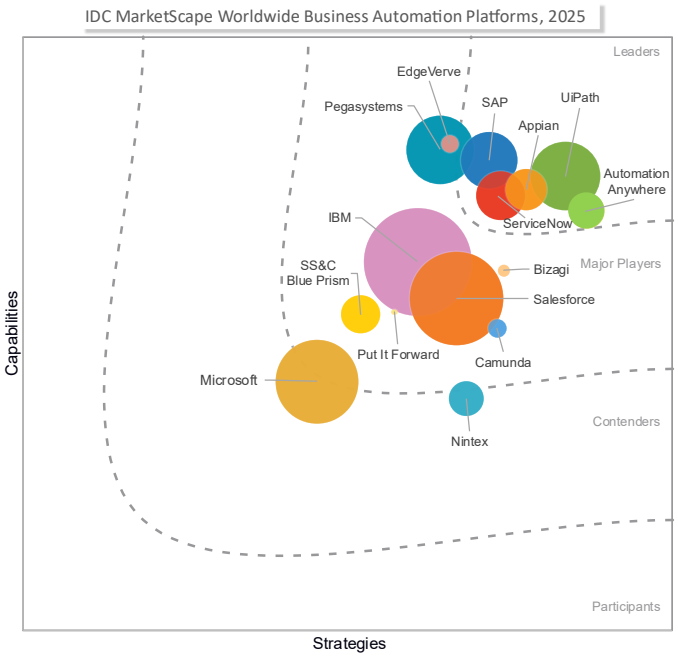
THIS EXCERPT FEATURES UIPATH AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Business Automation Platforms Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

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ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Business Automation Platforms 2025 Vendor Assessment (Doc # US52034624).

IDC OPINION

Business automation technologies have evolved from fragmented solutions into comprehensive business automation platforms (BAPs). These platforms enable enterprises to address diverse process improvement needs through a single system supporting multiple integrated automation technologies. By eliminating the complexity and cost of managing and integrating multiple disparate technologies, enterprises use these platforms to decrease time to value at a lower unit cost as they automate and improve their business processes.

The term *automation* began to be important to business processes with the adoption of robotic process automation (RPA) aimed at replacing manual repetitive tasks with automation scripts. But even before RPA, organizations were using workflow and case management to advance work from one role to the next or to the next stage without highlighting automation.

As enterprises increased their focus on improving efficiency, teams turned to utilizing tools that identified problem areas that helped them create design documents and requirements. Management began to require business cases that showed the return on investment. Automation and process improvement teams increasingly began to use process mining for statistical analysis of inefficiency to identify improvement opportunities. The statistics from the task mining and to-be design improvements are used to produce metrics that tie the business case to business value.

BAP vendors began to broaden their own automation planning capabilities with acquisitions, organic development, and partnerships and changed their dashboards to include business metrics for performance measurement and continuous improvement. The need to prioritize competing business cases led to features that assessed and compared the benefits of each use case, helping organizations prioritize and manage automation road maps.

To enable this type of rapid change and expansion, vendors began reengineering their platforms to offer flexible deployment options and ease of adding new capabilities. The first phase of reengineering involved rebuilding platforms to support cloud-native architecture deployable as a SaaS, virtual private cloud and as cloud managed software. With this architectural shift, new features — such as guaranteeing that improvements are always be backward compatible with existing capabilities or customers may hold

back the adoption of a new feature — were also added to simplify customer efforts to always be on the most current version and able to take advantage of new features.

A new phase is currently underway as vendors shift to an AI-first model to deliver process improvements. GenAI and advanced orchestration capabilities were the center of focus across BAP vendors over the past 18 months, including:

- **Natural language development:** BAP vendors traditionally offer no-code/low-code development environments. This is changing as BAP vendors increasingly leverage generative AI to enable natural language development to design and generate the automation and assets tied to the business case. Natural language design and development via text or voice interactions with a copilot promise to significantly decrease time, effort, and cost of improvement. The collection and utilization of operational data and benchmarks along with specialized foundation models show great promise in guiding the accuracy and completeness of natural language generated assets.
- **Agentic automation:** Agentic automation refers to the use of AI agents, copilots, and foundation models to execute and augment cognitive tasks with no or minimal human-in-the-loop interactivity. BAPs call an AI agent directly from a node in a workflow and also support the ability to route tasks to a copilot or copilot queue for interactivity between the copilot and worker to approve, correct, or complete the task.
- **End-to-end orchestration:** The most mature segments of BAP technologies, such as workflow automation, focus on automating how work flows from one role to the next. The goal was to improve the automated flow of work to improve end-user productivity and better understand the status of work in progress. Robotic process automation began to automate the task itself. The same is true of AI agents, document AI, and the use of APIs and data connectors. As automation replaces manual tasks, work executes more rapidly and can extend across business and IT processes. Vendors began focusing on orchestration as a way to execute complex, straight through or long-running automation using multiple technologies and offering — but minimizing — human-in-the-loop. This broadens the footprint of BAP and introduces new types of use cases.
- **Continuous optimization:** Continuous collection and processing of event logs coupled with machine learning algorithms and predictions are rapidly moving enterprises into continuous improvement cycles using BAP. Today, the BAP vendors evaluated have a range of capabilities in decision automation and performance measurement to track, identify, and assign tasks aimed at remediating problems that improve the performance of customers' business processes. BAP vendors are at various stages of maturity; continuous

optimization will accelerate as a much more significant part of process design and business value.

Over the next few years, orchestration coupled with agentic automation and continuous optimization will increasingly automate more tasks and subprocesses to the point where UI-centric applications will undergo disruption. For example, BAP vendors new to case management are using the same BPMN model, business rules, business objects, and tasks to implement case management. Instead of building a full case management application, however, the emerging design utilizes case orchestration, prioritizing task automation. When a task requires user input, the orchestration sends the task to an assigned worker or copilot queue. There is no centralized user experience, but each task has a user interface (UI) with the information needed to complete the work.

This evolving deconstruction of enterprise commercial and custom applications is driven by greater efficiency but also because agentic automation is likely to make a case-centric and UI-centric application less usable or expensive to maintain as manual work is replaced with AI agents, keeping in mind that AI agents utilize LLM and tools to execute work. Tools include other AI agents, RPA, APIs, data connectivity, decision automation, and algorithms. Human-in-the-loop input and copilots are logically part of the design.

This IDC MarketScape assesses traditional tools to build process applications and case management but also evaluates the emerging technologies along with the implications.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

For inclusion, vendors had to operate in at least two regions worldwide, utilize two or more automation or AI technologies as part of their platform, and offer complex orchestration capabilities utilizing multiple task automation and connectivity technologies.

ADVICE FOR TECHNOLOGY BUYERS

IDC offers the following advice to technology buyers researching, experimenting, deploying, or expanding their use of business automation platforms:

- **Consider business automation platforms as strategic tools.** Business automation platforms enable you to address multiple business automation use cases effectively and deliver agentic and automation solutions consistently while minimizing risk. Many organizations build competency centers around their business automation capabilities to systematically track, automate, and improve process inefficiency. While an organization may purchase a BAP for a single

major improvement, the greatest benefit is using the platform strategically across the enterprise.

- **Explore vendor GenAI, AI, and agentic features to compare how these emerging capabilities will accelerate use case development and management.** Vendors evaluated in this IDC MarketScape utilize AI to accelerate automation design and development, but vendors differ significantly in how broadly the use of AI accelerates development of key application assets (such as process design, user interface forms, data definitions, workflows, and orchestrations). Vendors also differ significantly in how they utilize AI in execution and performance management activities beyond development, such as task augmentation, performance monitoring, analytics, and optimization.
- **Seek technology suppliers that have clear road maps to enable delivery of automation use cases that leverage AI agents.** A BAP is a natural foundation for the development and delivery of AI agents that will play an active role in innovating, connecting, and increasing the efficiency of end-to-end business processes. With BAP heavily focused on rules-based automation and newer capabilities focused on agentic automation, these platforms will play a key role in the creation of digital labor.
- **Explore the value of value engineering and consider how vendors can support you.** Value engineering is partly a vendor service proposition with vendors offering structured programs to help customers become successful in their projects. BAP vendors either directly offer or partner with vendors specializing in the use of tools, such as process and task mining and BPMN modeling and mapping, to help customers improve the accuracy of identifying automation and process improvement opportunities and translate them to ROI and metrics to build credible business cases. This evolved to also support ongoing performance measurement and continuous improvement. New types of planning tools emerged during the IDC MarketScape assessment that enable teams to collaborate and interact with a copilot to generate process models and assets that speed up development. The planning capabilities of BAP have proven to be critical to success.
- **Consider how vendors are working to simplify your adoption of their platforms.** Business automation platforms can include multiple tools and platform components, and it takes consistent, deliberate engineering work from a vendor to create a platform that is easy for customers to adopt, implement, and maintain at scale. Platforms should be well-integrated, composable, and consistent in terms of the features and capabilities offered around platform administration and upgrade. Platforms delivered via an as-a-service model are likely to provide better adoption experiences, but this is not automatically the

case — particularly if a vendor's platform-as-a-service offering still comprises multiple disconnected elements behind the scenes.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

UiPath

UiPath is positioned in the Leaders category in this 2025 IDC MarketScape for worldwide business automation platforms, based on IDC analysis and customer feedback.

UiPath was founded and saw its initial phase of strong growth as a pure-play RPA technology vendor. Over the past five years, a combination of organic R&D and a handful of targeted acquisitions have significantly broadened UiPath's value proposition in automation and process improvement. With the addition of new process orchestration capabilities, emerging foray into case management and delivery of agentic automation capabilities, UiPath's overall capabilities move it far beyond its RPA heritage.

This IDC MarketScape evaluates both vendor strategy and technical capabilities. UiPath's strategy was comprehensive, aimed at innovative features to advance business automation platform capabilities and enabling customers to adopt the new features, with more than 75% of UiPath customers on the current release. UiPath customers note that the vendor was strong in innovation.

Eight technology segments were evaluated: automation planning, agentic automation, end-to-end orchestration, business process automation, decision automation, robotic process automation, platform and life-cycle management, and performance measurement. UiPath offers capabilities in each segment.

Key highlights of UiPath Platform include:

- UiPath has strong capabilities in automation planning, including process mining, simulation, and task mining, which are all critical components of automation planning. UiPath lacks benchmarking services offered by a few competitors and has average capabilities in BPMN modeling and process mapping. UiPath road map includes natural language business process design and generation of BPMN models, putting UiPath behind vendors that invested earlier in this capability.

BPMN models import into UiPath Studio to speed up development. UiPath also had comprehensive capabilities for software that assesses and manages automation road maps.

- UiPath is in an interesting position in business process automation. It has no legacy business to protect. It has strong workflow automation capabilities and highly capable task management and ability to route and assign work. But its case management features are less capable in supporting traditional case management applications.
- However, case management faces disruption as agentic automation couples with orchestration, changing the design pattern from case management applications to automation-intensive case management orchestration. This scenario has agentic automation playing a much bigger role in automating cognitive tasks using AI agents and augmented with human interactivity with copilots. UiPath's comprehensive capabilities in orchestration, coupled with the core components of case management and copilot capabilities, poise UiPath to join other vendors that are planning to disrupt the case management paradigm.
- UiPath continues to innovate in RPA, introducing GenAI self-healing features and road map in 2025, including automated repair of automation scripts failing in production and fixes are suggested to developers and admins that can be applied in one click. Self-healing aims to improve the ease of RPA life-cycle management and maintaining automation scripts in production.
- Agentic automation is a work in progress for all vendors, and UiPath has average capabilities. UiPath introduced AI agent development and a business copilot and supports GenAI-based document processing. Its AI governance, privacy, and security features are not as comprehensive as a few other vendors evaluated in this IDC MarketScape.
- Capabilities to measure and manage the performance of the UiPath platform outperform most competitors. UiPath supports continuous optimization that includes recommendations and algorithms to identify and manage exceptions. It also tracks the performance of business metrics from the original use case through execution.

The UiPath Platform is designed to work as an integrated collection of capabilities; however, customers can utilize the individual tools as part of UiPath's consumption pricing model.

UiPath's RPA capability is now also available as a certified SAP Solution Extension (Solex) within the SAP Marketplace. SAP integrates UiPath Studio into SAP Build Process Automation's design environment and integrates UiPath Orchestrator directly into the SAP Task Center within SAP Build.

In addition to its core platform, UiPath also offers a dedicated software testing automation product, leveraging many features of the platform, called UiPath Test Suite and Test Cloud.

Customer Support and Success Strategy

UiPath offers a tiered success program with free basic support accessible through web forms. The other tiers include success strategy, encompassing success planning from customer onboarding to citizen development advisory aimed at democratizing business automation. UiPath promotes customer education and training through UiPath Academy, offering free online and instructor-led training tailored to specific roles. In addition, it invests in growing the developer community through various initiatives, including events, academic alliances, student programs, and forums.

To ensure customer success and maximize benefits, UiPath provides the Northstar model, which aligns industry-specific automation goals with measurable outcomes, such as financial impact, revenue growth, customer experience, employee experience, and other operational KPIs.

UiPath Quick Facts

- **Employees:** 4,000
- **Platform customers:** 11,000
- **Customers by employee size:** 65% have 5,000+ employees
- **Platform partners:** 350 managed; 5,000+ in total
- **Regional sales/support:** Americas, Central Asia, APJ, and EMEA
- **Industry focus:** Insurance, healthcare, life sciences, telecoms, manufacturing, public sector (federal, state, and local), airlines and aviation, logistics, high technology, utilities, oil and gas, media and entertainment, automotive, consumer packaged goods, and retail
- **Deployment options:** SaaS on Azure, customer self-managed on AWS Marketplace and Google Cloud, or customer self-managed via UiPath Automation Suite in Linux, EKS/AKS, or OpenShift

Strengths

- UiPath has a broad platform of sophisticated automation functionality.
- UiPath has a strong vision for end-to-end orchestration and delivery of agentic automation capabilities, with the opportunity to disrupt traditional business process execution.

- Business value engineering engagements, combined with sophisticated tooling for value measurement and optimization, provide a strong foundation for true continuous improvement.
- Customers are positive about UiPath support, particularly in relation to helping clients wanting to implement "citizen development" programs — identifying and training people in business teams, facilitating change management, and scaling project implementation.

Challenges

- Although UiPath offers a comprehensive and broad business automation platform with innovative features that go far beyond its original heritage, it is still often viewed in the market primarily as an RPA vendor.
- UiPath offers a virtual private cloud managed by customers that is available in both the AWS and Google Cloud Platform marketplaces but supports only one SaaS deployment option.
- UiPath introduced agentic automation capabilities and has an extensive road map, including natural language planning and development, but lags behind competitors that already delivered these capabilities.

Consider UiPath When

Consider UiPath in most circumstances, particularly if you have a large population of users with potential to get involved in development and especially when your cloud strategy is built around Azure.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings,

customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Business automation platforms enable enterprises to address diverse process improvement needs through a single system supporting multiple integrated automation technologies. By eliminating the complexity and cost of managing and integrating multiple disparate technologies, enterprises use these platforms to decrease time to value at a lower unit cost as they automate and improve their business processes.

This IDC MarketScape evaluated eight technology segments: automation planning, agentic automation, end-to-end orchestration, business process automation, decision automation, robotic process automation, platform and life-cycle management, and performance measurement.

Each of the eight segments contain discrete subsegments. For more details, see *IDC ProductScape: Worldwide Business Automation Platforms 2025* (forthcoming).

Automation Planning

Automation planning is a strategic process that organizations use to identify, prioritize, and implement process improvement with a focus on automating their operations wherever possible. Teams use specialized tools to support the separate phases of automation planning. This IDC MarketScape assesses the following:

- **Automation planning GenAI design and development:** Natural language generation of business process design and business process model and notation (BPMN) models and able to generate assets, such as forms, models, and data objects, used to build the process
- **Process mining:** Traditional and object-centric process mining used to collect and correlate event logs and other data produce statistics about how efficiently the process operates in production. This typically produces a visual knowledge graph that identifies areas of efficiency and inefficiency. Object-centric process mining tracks complex relationships at the object level in a business process and its adjacent processes to better visualize the relationships, for example, across two or more business processes. Process mining also includes:
  - Simulation and advanced analytics to determine optimal ways to improve the process
  - Process monitoring and reporting to continuously collect event logs aimed at situational awareness and problem detection
- **Formula development of metrics and KPIs:** Prebuilt KPIs and the ability to build formulas that are used to track performance for monitoring and performance histories
- **Packaged support for key applications:** BPMN models and connectors used for applications used in process mining
- **Process benchmarks:** Collection of aggregated business process performance data used to compare an organization's operational performance in a business process or subprocess compared with peers and leaders. Benchmarks may include business process performance, subprocess performance, or task performance, including task automation.
- **Task mining:** Software that provides a fact-based understanding of how workers perform manual tasks to assess the task's automation potential. Task mining captures mouse clicks and keystrokes to create data, prepares the data for analysis, provides knowledge graph or statistics about task performance, supports simulation and advanced analytics to optimize the automation potential, and generates all or part of an automation script.
- **BPMN modeling and simulation tools:** Use of the standard graphical language for visualizing business processes that also supports redesign for process improvement. BPMN modeling may include mathematical simulations and may visualize the output of process and task mining.
- **Automation and process improvement road map management:** Manages the portfolio of business cases for automation and process improvement; typically includes an evaluation of each business case based on an optimization of business value and complexity

Agentic Automation

Agentic automation is emerging capabilities of business automation platforms that leverage AI for automation and process improvement. This IDC MarketScape assesses the following:

- **Model selection:** Customer selection and vendor-bundled options for foundation model selection
- **Business copilot:** Task-specific capabilities offered by vendors that enable business users to interact with a foundation or specialized model and perform work, including looking up information, summarizing content, and completing, correcting, or approving tasks (Most vendors in this assessment also deliver or queue tasks to the copilot.)

Note that developer copilots are extensions of the specific automation technology development environment and used for natural language development and recommendations. For example, one or more vendors offer developer copilots and natural language development to generate BPMN models, workflow automation, case management assets, robotic process automation (RPA), decision automation, and forms automation. Further:

- **AI agent development:** No-code or natural language development and testing of AI agent studios or studio extensions; includes planning, prompt development and testing, use of retrieval-augmented generation, synthetic generation of data for testing, selection of tools to support the agent, and emerging use of LLM reasoning to validate the accuracy of the actions proposed by the agent
- **GenAI-based content and document processing:** Includes extracting data from unstructured content, classification of content, translation, email or message generation, and content summarization
- **Specialized models and capabilities:** Includes machine learning and GenAI models created or used by BAP vendors for specialized purposes, including TPOT AutoML library for feature engineering and CodeGen for automation; also includes fine-tuning of models
- **AI privacy, security, and governance:** AI-specific features that support AI trust, data privacy, and security, such as data usage monitoring, content safety moderation, content verification, explainability, access controls, and data encryption

Business Process Automation

Business process automation is a group of technologies that enable organizations to standardize and execute custom business processes. This IDC MarketScape assesses the following:

- **Workflow automation:** Development and execution environment that streamlines and automates the sequence of tasks that make up a business process or subprocess by advancing each step in the task to the role required to complete the work
- **Case management:** Development and execution environment to help organizations manage and track cases, from intake to resolution, by organizing information, standardizing and assigning tasks, executing workflows, and facilitating communication and collaboration among team members and external stakeholders
- **Human-in-the-loop task management:** In the context of business automation, task management is the UI for manual task completion and includes deadlines, escalation and reassignment policies and SLAs. This may be a form, a single page app, or embedded in an application UI.
- **Work assignment:** Automates the assignment of human-in-the-loop tasks based on policies, including assigning to a queue, to first available in the queue, by a transaction or event type, and escalations; includes support for compliance to prevent fraud, for example, assigning a validation task to a different user
- **Forms automation:** Development and execution environment to automate the creation of forms that may be standalone, for example, attaching a form to an email or may embed in an application user interface
- **UI development:** Development and delivery of the user experience used that supports a standalone task or an entire web or mobile application

Task management, work assignments, and forms automation are utilities leveraged by other components of BAPs. They are standard features of case management and workflow automation and used in RPA and agentic automation.

Decision Automation

Decision automation involves the use of technology to make decisions that would traditionally require human judgment. Business processes commonly use business rules, either embedded or callable as a decision service. Machine learning is also used for decision automation through the creation of algorithms that make predictions and recommendations. This IDC MarketScape assesses the decision automation capabilities:

- **Rules-based decision automation:** Support for standards, use of decision tables, low-code development of business rules, use of AI agents for enhanced decision-making, and natural language translation of policies into decision artifacts

- **Continuous decisioning:** Use of streaming technologies to collect and process event logs, utilizing decision services to trigger actions, recommendations, or detect anomalies
- **Algorithmic decision automation:** Mathematic or machine learning algorithms to automate decision-making
- **Other decision automation capabilities:** Includes scheduling, optimization use cases, category classification, decision trees, and customer churn and revenue at risk models

End-to-End Orchestration

End-to-end orchestration automates and streamlines complex processes across different applications, environments, and sequence of operations from beginning to end. This typically involves the use of multiple automation and connectivity technologies and may involve human-in-the-loop tasks embedded in the orchestration.

Execution of an orchestration may reside on BAP using APIs and data connectors. Execution also may involve the use of distributed orchestration assets that execute locally while managed and monitored centrally. Orchestration may also be state based or model driven. BAP vendors design the orchestration with models. Some vendors offer state-based design options

This IDC MarketScape assesses the following orchestration capabilities:

- **Use case alignment:** Use cases range from simple, such as action flows, to complex, such as the management of complex long running logistics processes.
- **Asynchronous communications patterns:** Support for a mixture of communications patterns, such as request-response, streaming delivery, dynamic routing, and others.
- **Orchestration middleware:** All vendors utilize APIs as part of their orchestration capabilities for connectivity. Vendors may also offer additional connectivity and intermediary options, including messaging, message brokers, and Apache Kafka and similar capabilities.
- **Task automation:** RPA, AI agents, decision automation, including use of algorithms and business rules, and intelligent document processing.
- **Orchestration design and development:** Orchestration modeling, development of business rules and decision tables, catalog of connectors, and support for DMN and BPMN. Note that orchestration development is part of the standard BAP development environment.

Robotic Process Automation

RPA is front-end UI automation that captures the mouse clicks and keystrokes of repetitive manual tasks, creating automation scripts that run when invoked to execute the task. This IDC MarketScape assesses the following RPA capabilities:

- **Robot types:** Attended and unattended across operating systems and environments
- **RPA development capabilities:** Natural language development, no-code and low-code development environments, recorder to capture mouse clicks and keystrokes, computer image recorder, support for Windows UI automation framework and HTML, or DOM structure for web apps along with many other features
- **Self-healing capabilities:** Use of GenAI and continuous recording to automatically repair broken automation scripts
- **Packaged support for enterprise and productivity applications:** Microsoft Excel and Outlook, SAP, Salesforce, ServiceNow, Oracle, and others
- **Testing and life-cycle management:** Partner and vendor supplied test automation, copilot for testing, and other features

Performance Measurement

Performance measurement is the systematic process of collecting, analyzing, and visualizing key metrics to evaluate how well an automation program and processes are performing against predetermined goals and objectives. This IDC MarketScape assesses the following performance measurement capabilities:

- **Performance dashboard:** Performance measurement capabilities aligned with relevant KPIs and financial performance metrics, automation program measurements for ROI and savings tracking, default and configurable SLAs, before and after performance measurement, exception tracking, and other features
- **Monitoring and notifications:** Monitors performance issues and problems against SLAs, predicts performance SLA failures, routes problems to a queue or named user for remediation, collects debug details to notify admins when errors occur
- **Continuous optimization:** Guided investigations systematically explore processes and delays for inefficiencies, actionable recommendations about emerging inefficiencies, predictive algorithms that identify correlated exceptions for management and containment, continuous health checks, and other capabilities

Platform and Life-Cycle Management

Platform and life-cycle management is oversight and coordination of business automation platform deployment, governance, administration, change management, and deployment. This IDC MarketScape assesses the following platform and life-cycle management capabilities:

- **Security and data privacy:** Authentication, encryption, and data privacy policies
- **Compliance:** Support for key compliance frameworks and certifications, including GDPR, HIPAA, FEDRAMP, ISO 27001, Soc 1, Soc 2, NIST 800-53, HITTRUST, and CSA STAR
- **Data management and integration:** Database options, data connectors, and API catalogs
- **Multilingual capabilities:** Translation capabilities, languages supported, and different levels of language support
- **Deployment options:** Self-managed software, virtual private cloud, and SaaS/PaaS
- **Platform observability and monitoring:** Support for third-party observability/security offerings, log data collection policies, and systems monitoring

LEARN MORE

Related Research

- *IDC ProductScape: Worldwide Business Automation Platforms* (forthcoming)
- *IDC ProductScape: Worldwide End-to-End Orchestration, 2025* (IDC #US53352325, April 2025)
- *Worldwide Business Automation Platform Market Shares, 2023: Good Growth Amid Technology Consolidation* (IDC #US52779724, December 2024)
- *Moving Agentic Workflows into Work* (IDC #US52551724, September 2024)

Synopsis

This IDC study represents a vendor assessment of the business automation platforms market through the IDC MarketScape model. Business automation platforms have evolved from standalone single technology offerings into comprehensive systems that integrate multiple automation and AI technologies into an AI-first approach to design, development, and process execution. These platforms now feature natural language development, agentic automation, end-to-end orchestration, and continuous optimization.

"We expect to see business automation platforms play a major role in broadening the use of automation as GenAI is used to simplify development and AI agents used to automate knowledge-centric tasks," according to Maureen Fleming, program vice president, Convergence of AI and Automation at IDC. "Over the next several years, AI agents combined with orchestration and human-in-the-loop interactivity with copilots will largely disrupt how our enterprise processes operate."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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