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The Gartner 2023 Predictions: Hyperautomation (Inclusive of AI, RPA & Low Code)



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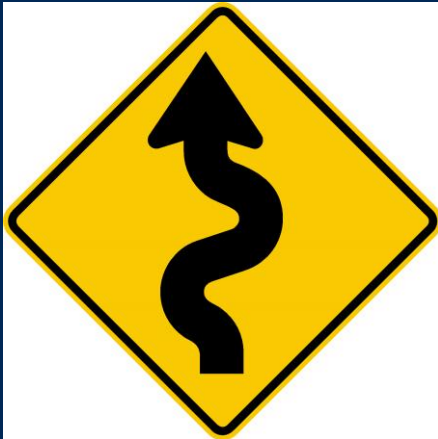
Frances Karamouzis

Distinguished VP Analyst



Hyperautomation

Gartner Predictions



Market Dynamics



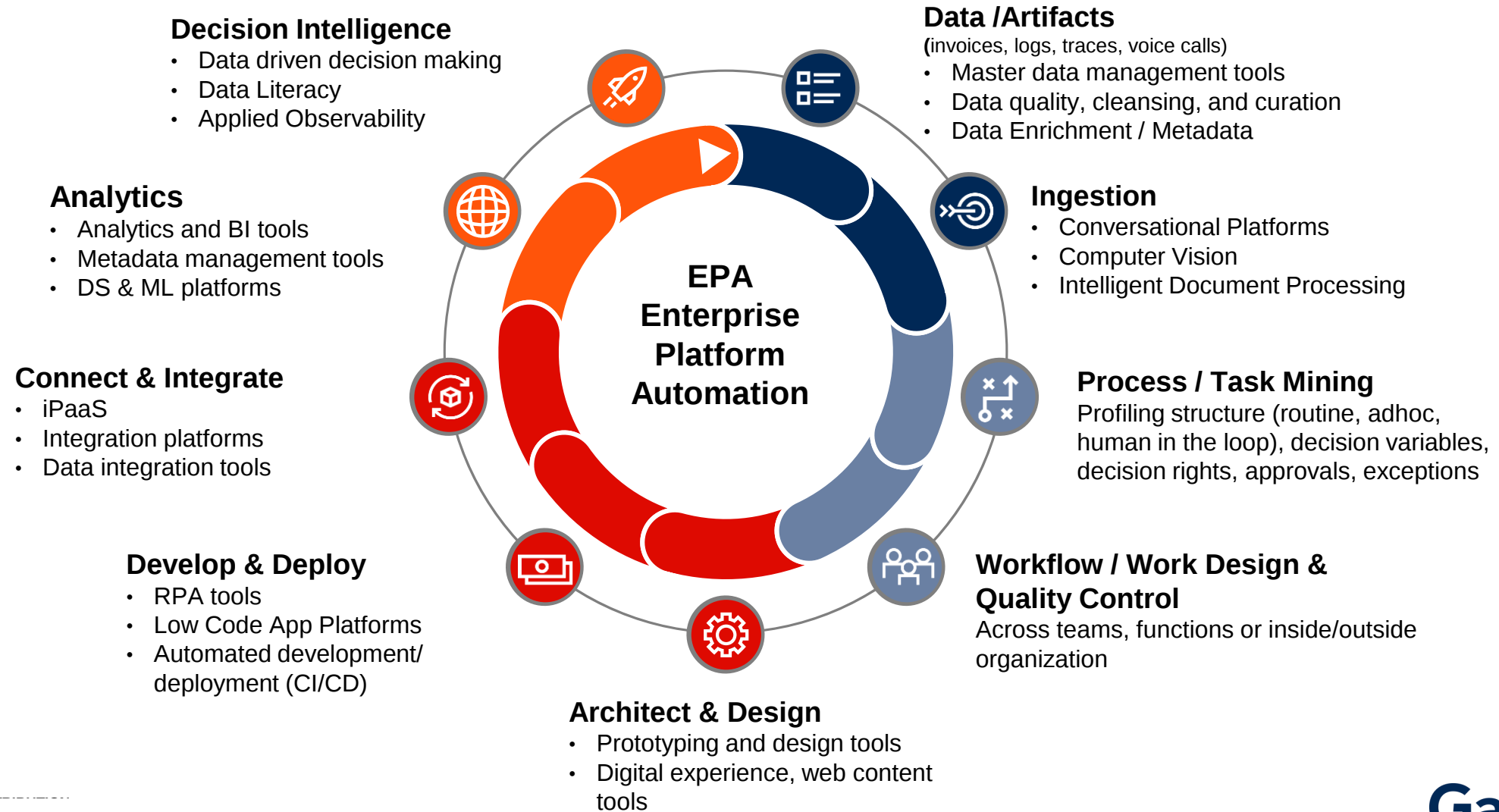
Sell Side



Buy Side

EPA – Enterprise Platform Automation

- Artifacts / Ingestion
- Automation
- Process & Workflow
- Analytics / Decision intelligence



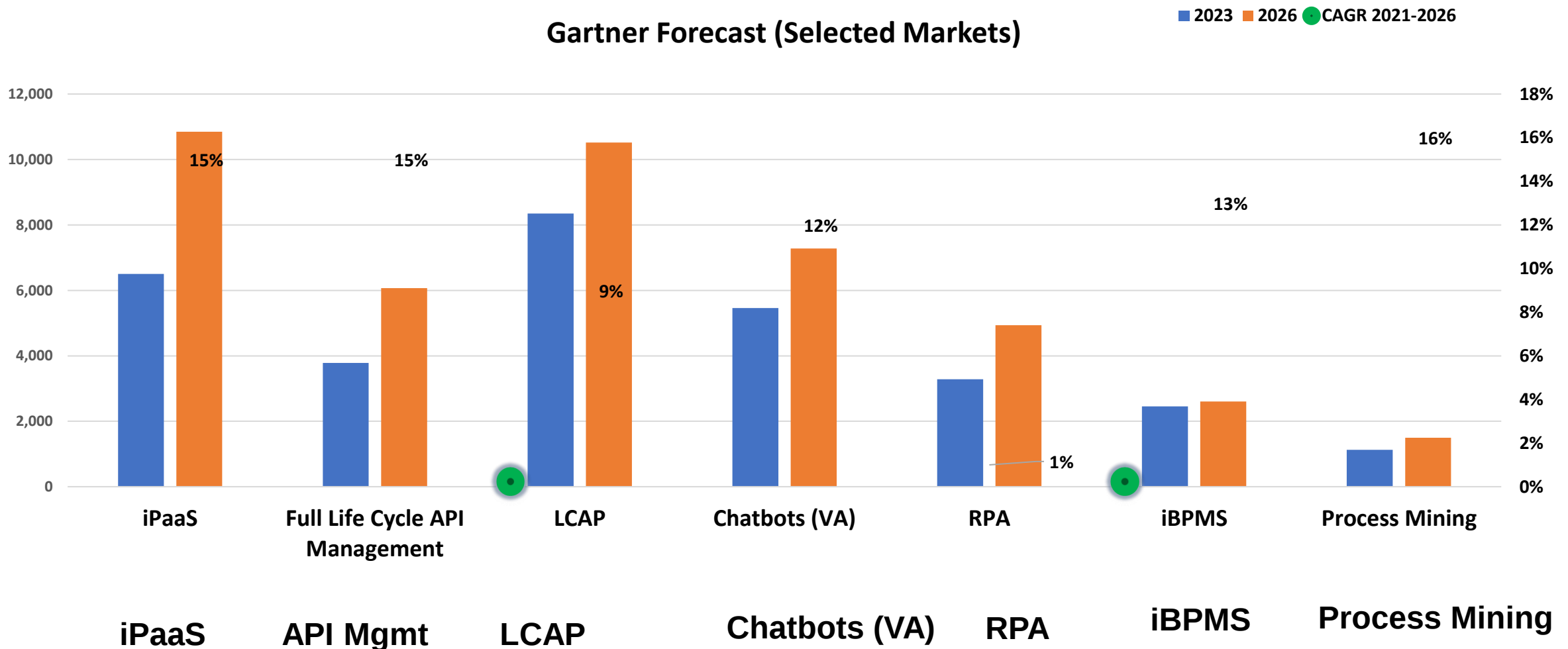
Market Dynamics



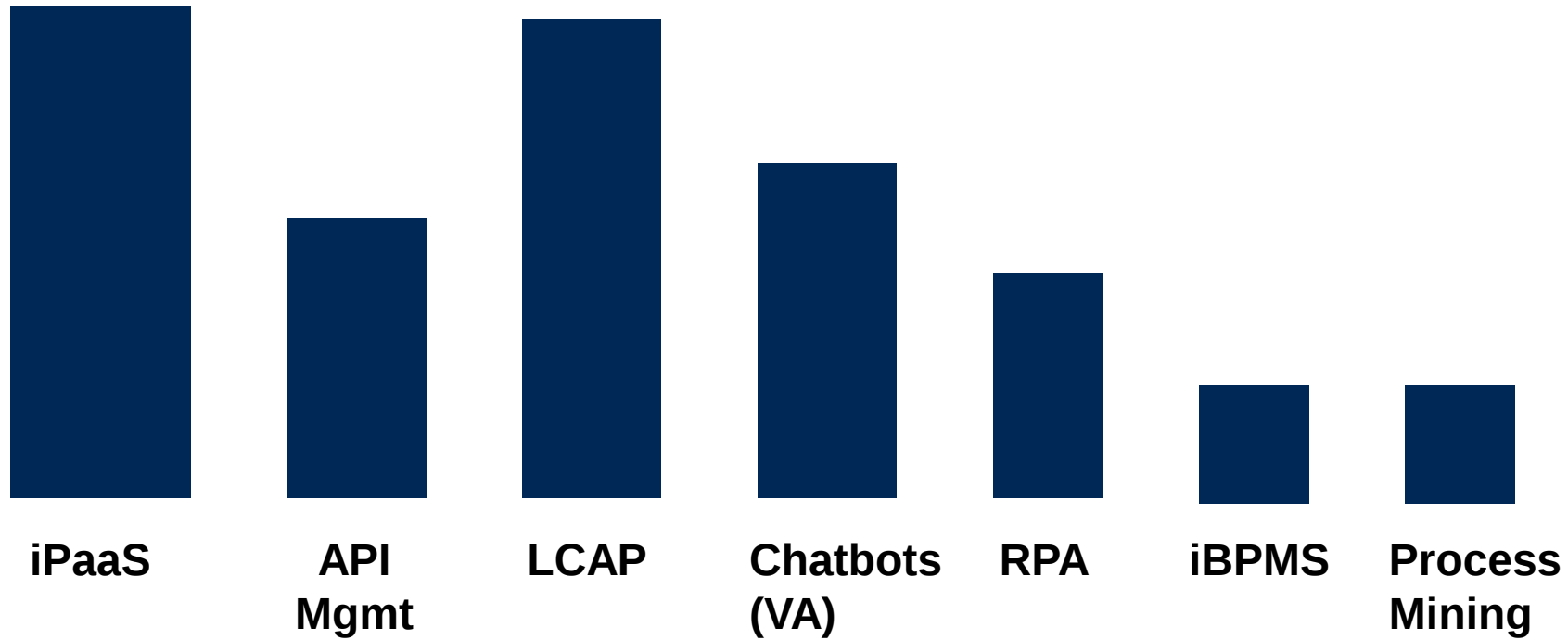
- Lots of Swim Lanes
- Overwhelming Number
- Vendor Depth, Breadth, Size and Focus varies dramatically
- **“Platform” Play**
 - Enterprise Wide hence, Integrated
 - Cloud Based
 - Orchestrated

Gartner Forecast (Selected Markets)

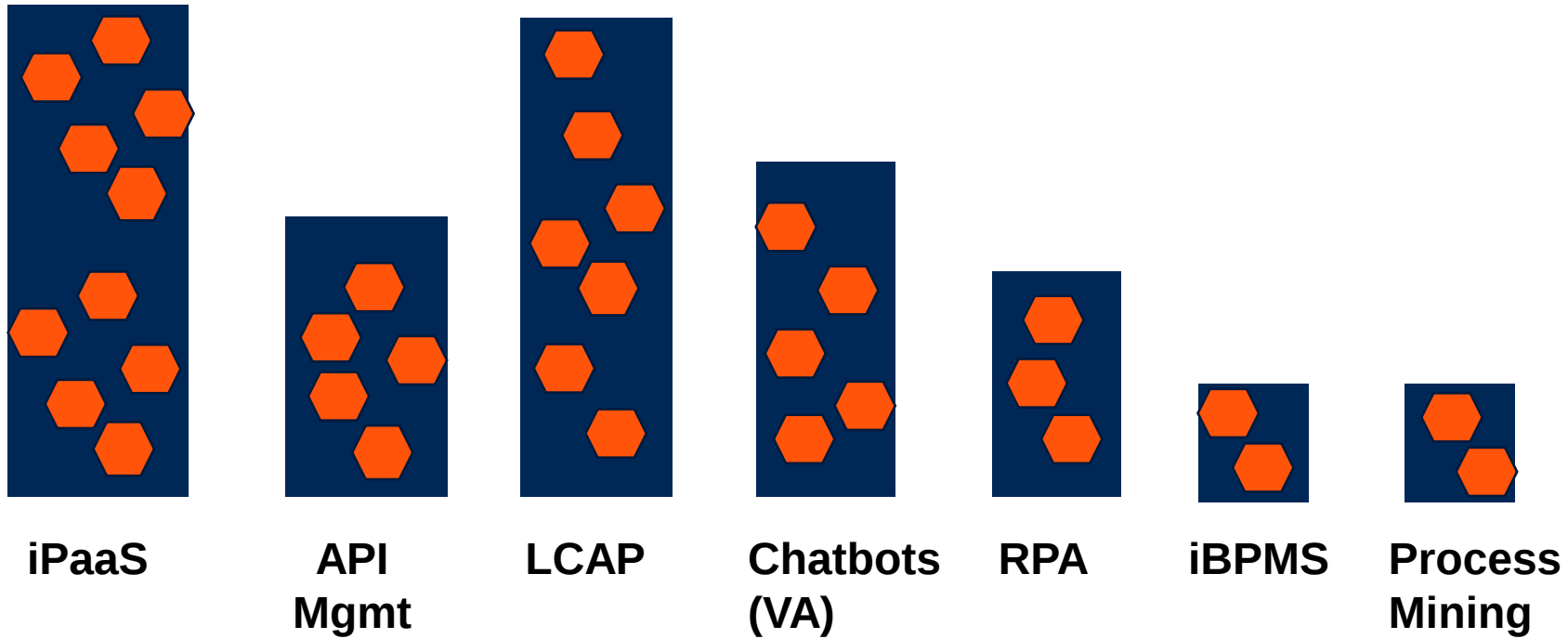
Forecast Analysis: Hyperautomation Enablement Software, Worldwide | 6 October 2022 | G00775055



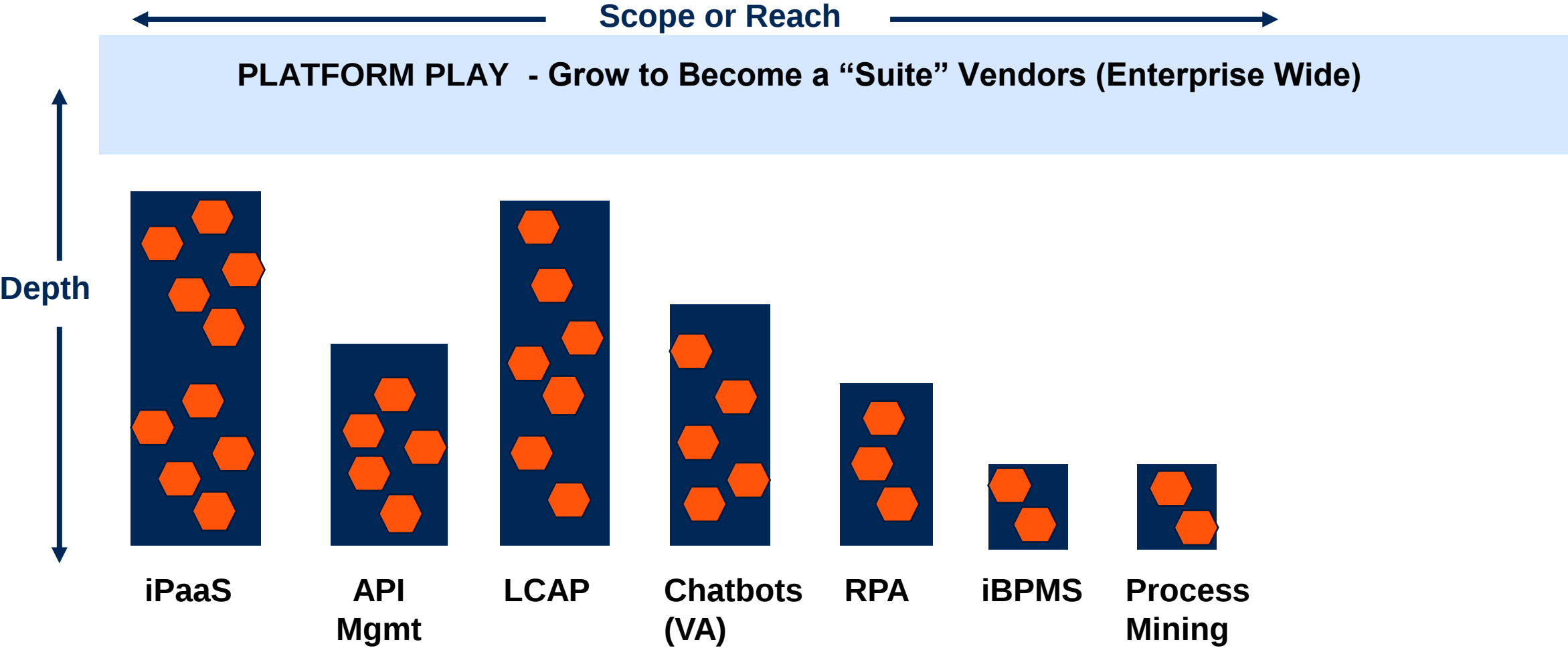
Market Dynamics



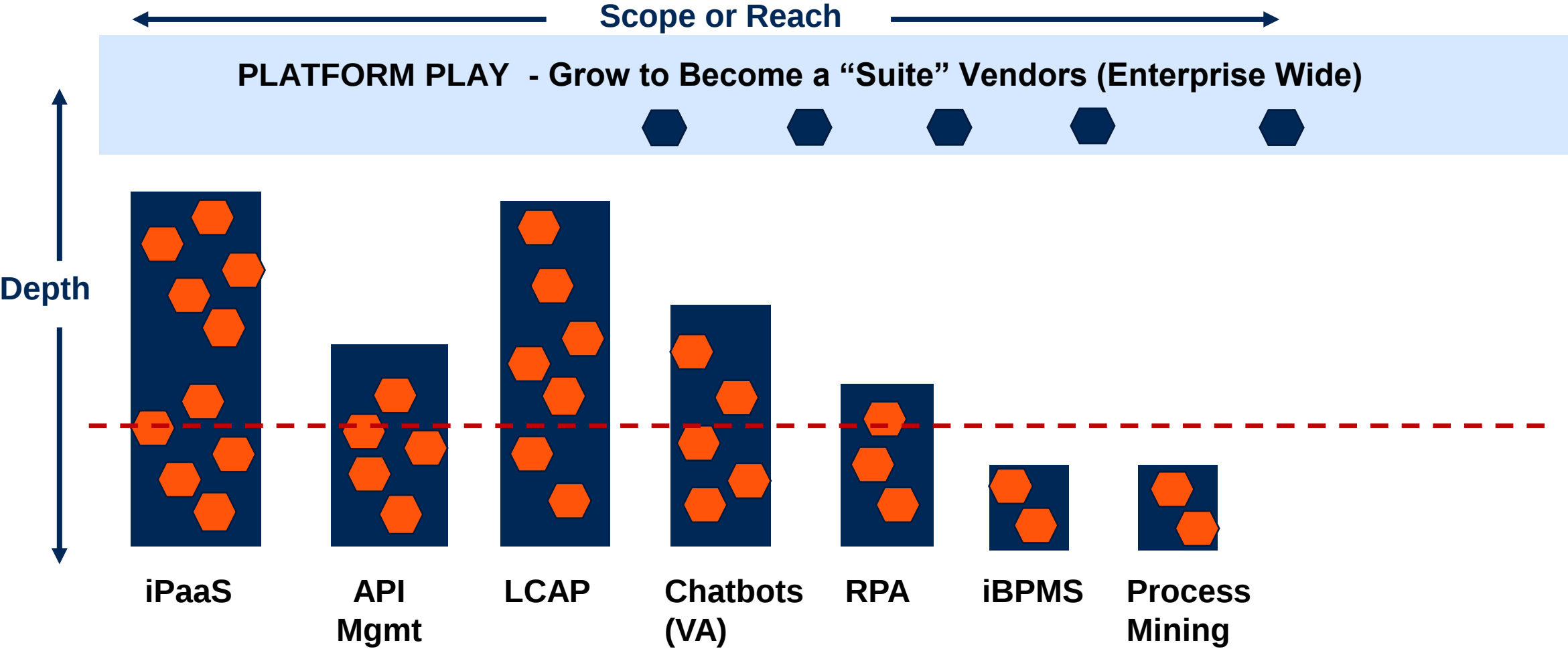
Market Dynamics



Market Dynamics

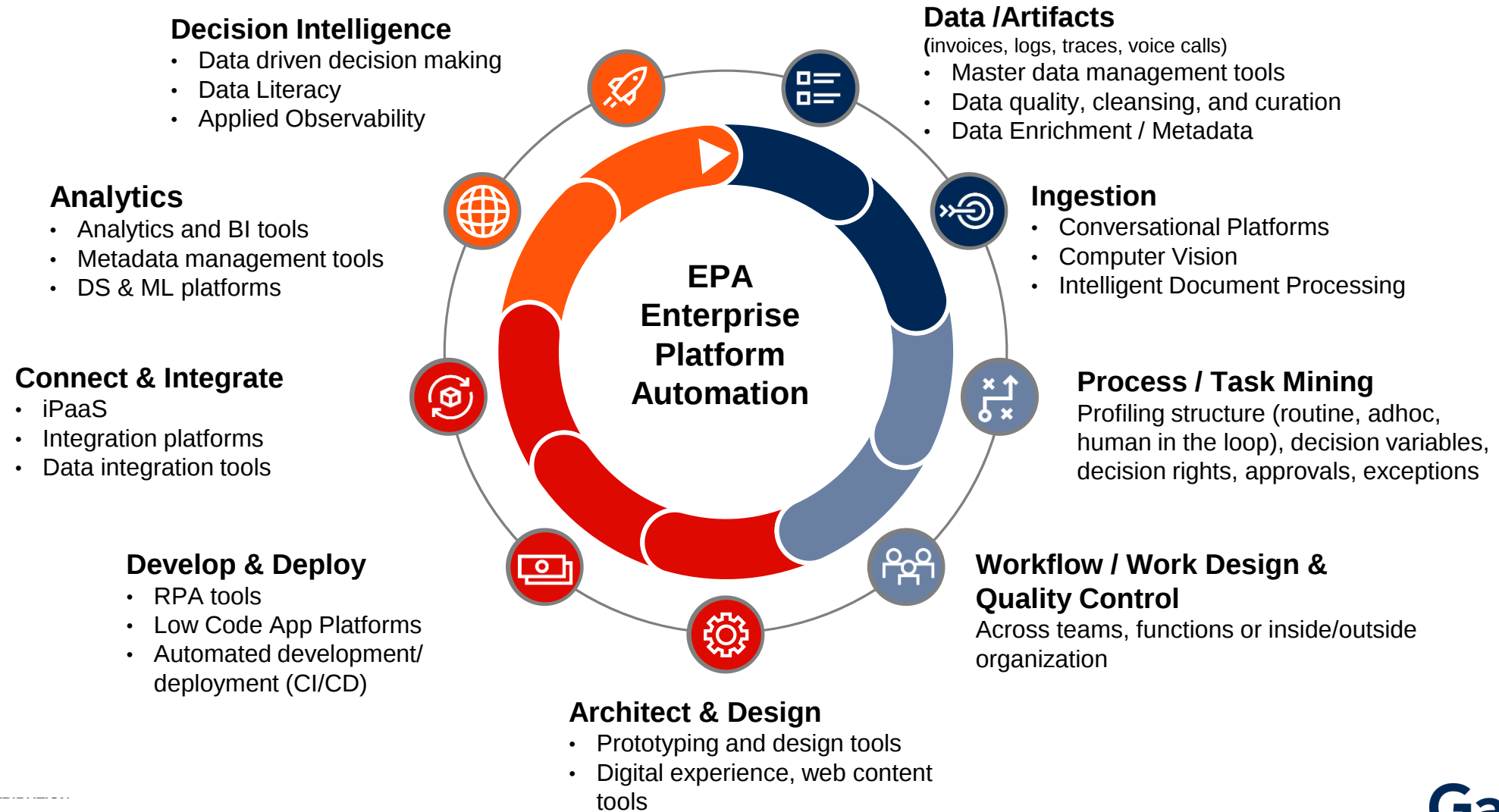


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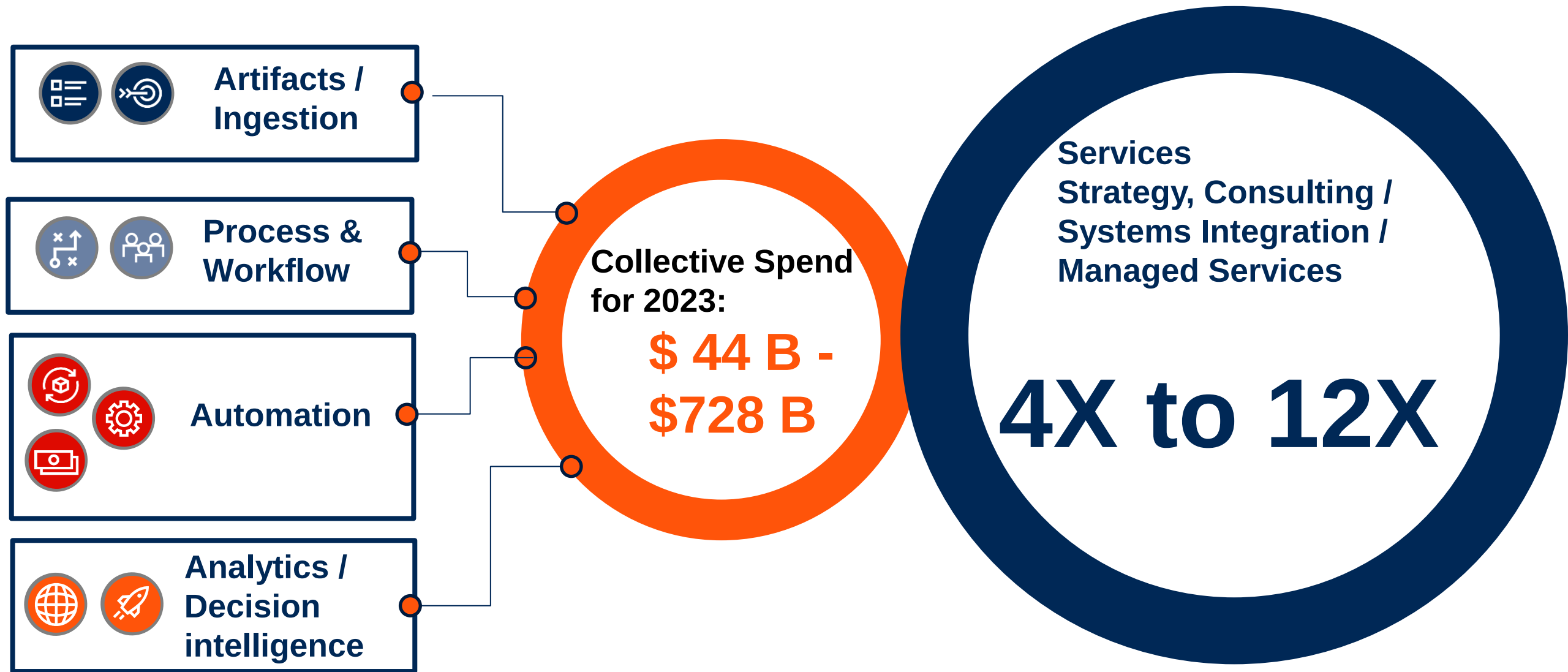


EPA – Enterprise Platform Automation

- Artifacts / Ingestion
- Automation
- Process & Workflow
- Analytics / Decision intelligence



Total Market Sizing



Note: All market sizing and growth numbers are for 2023.
Data can be found [Forecast Analysis: Hyperautomation Enablement Software, Worldwide](#) | 6 October 2022 | G00775055

Low-Code Market

1. Through 2022, the needs of **business-driven hyperautomation** will be one of the top three drivers for low-code adoption
2. By year-end 2025, about **50% of all new low-code clients will come from business buyers that are outside the IT organization.**
3. By 2025, **70% of new applications developed by enterprises will use low-code or no-code technologies** (up from less than 25% in 2020).
4. By 2025, **75% of large enterprises will be using at least four low-code development tools** for both IT application development and citizen development initiatives.

API First Approach

By 2025, 40% of IT leaders purchasing patterns will shift due to an **API first approach** to automation driving shifts in the design and implementation of business driven hyperautomation initiatives.

Gartner characterizes an API first approach as prioritizing connectivity to a system via the programmatic interface provided by that system.

- APIs are **easier to secure** and **more stable to interact** with than screen scraping techniques. There is a steady and clear trajectory to an API first approach as evidenced by RPA vendors increasingly investing in improving their API connectivity capabilities.
- **Reduction in Core Need for Screen Scraping.** Application portfolios are changing with more SaaS being adopted in portfolios, many of which have documented APIs. This will reduce the core need for RPA screen scraping that initially thrust these product categories to the forefront

New Realities

More Offerings with Expanded Breadth & Depth

- ... Continued Growth in Functionality
- ... More User Friendly
- ... Ease of Integration will increase

Expansion for Enterprise-Wide Platform Play ...

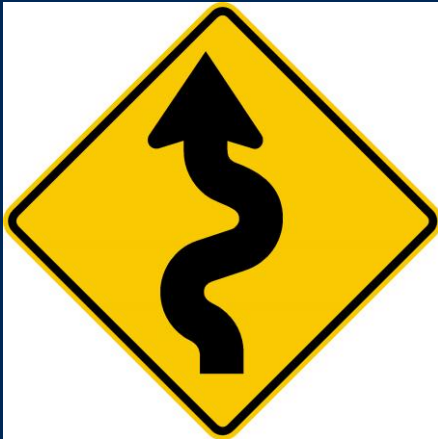
- ... Hyper-competition
- ... Acquisitions will continue

Pricing

- ... Megavendors will focus on different pricing and bundling against smaller competitors
- ... Price Increases

Hyperautomation

Gartner Predictions



Market Dynamics

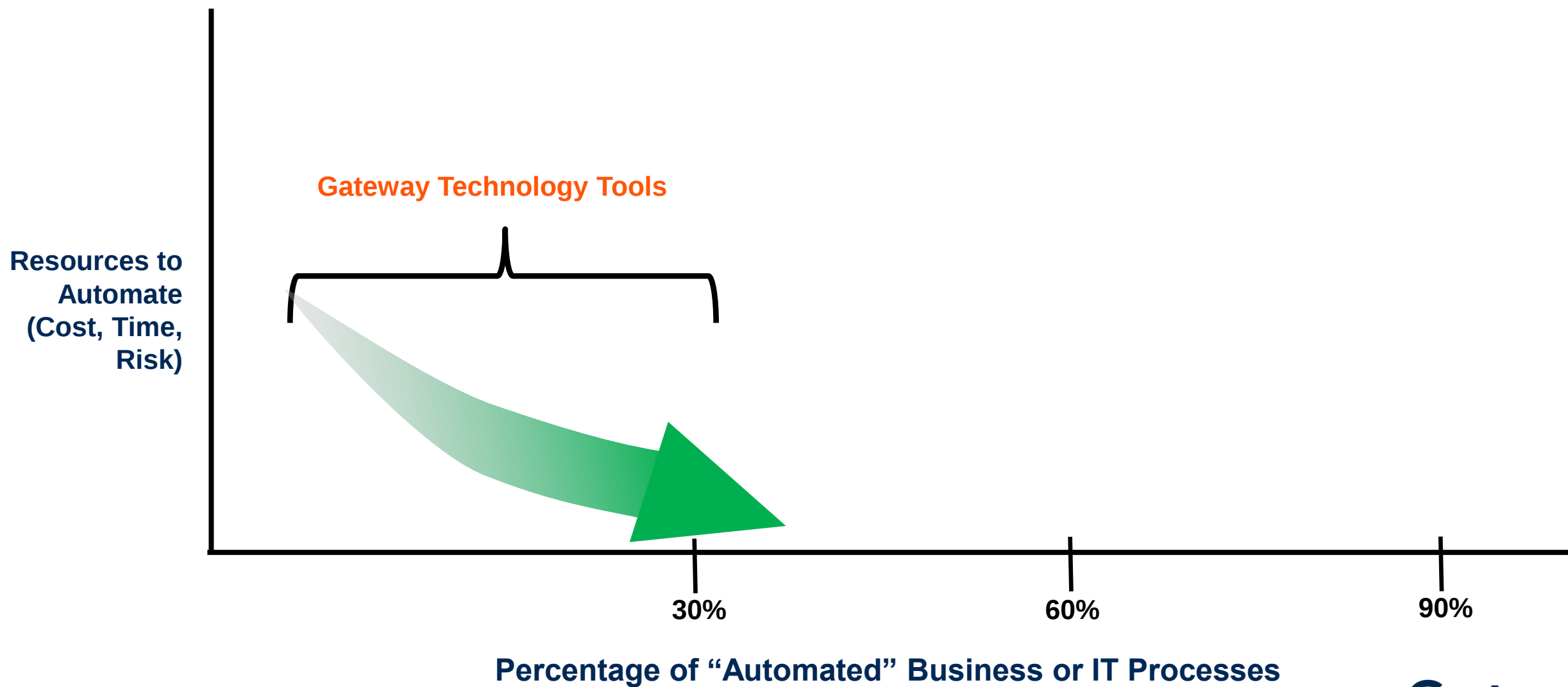


Sell Side

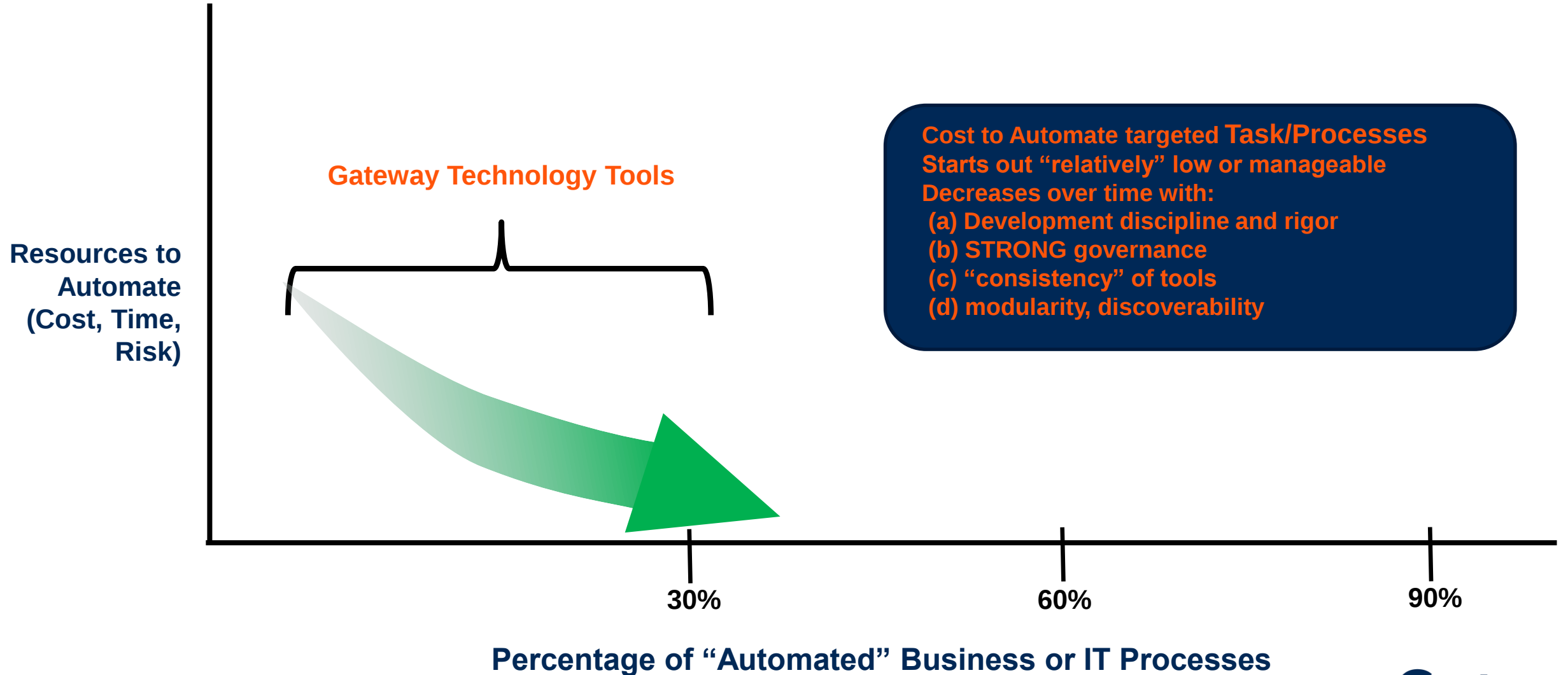


Buy Side

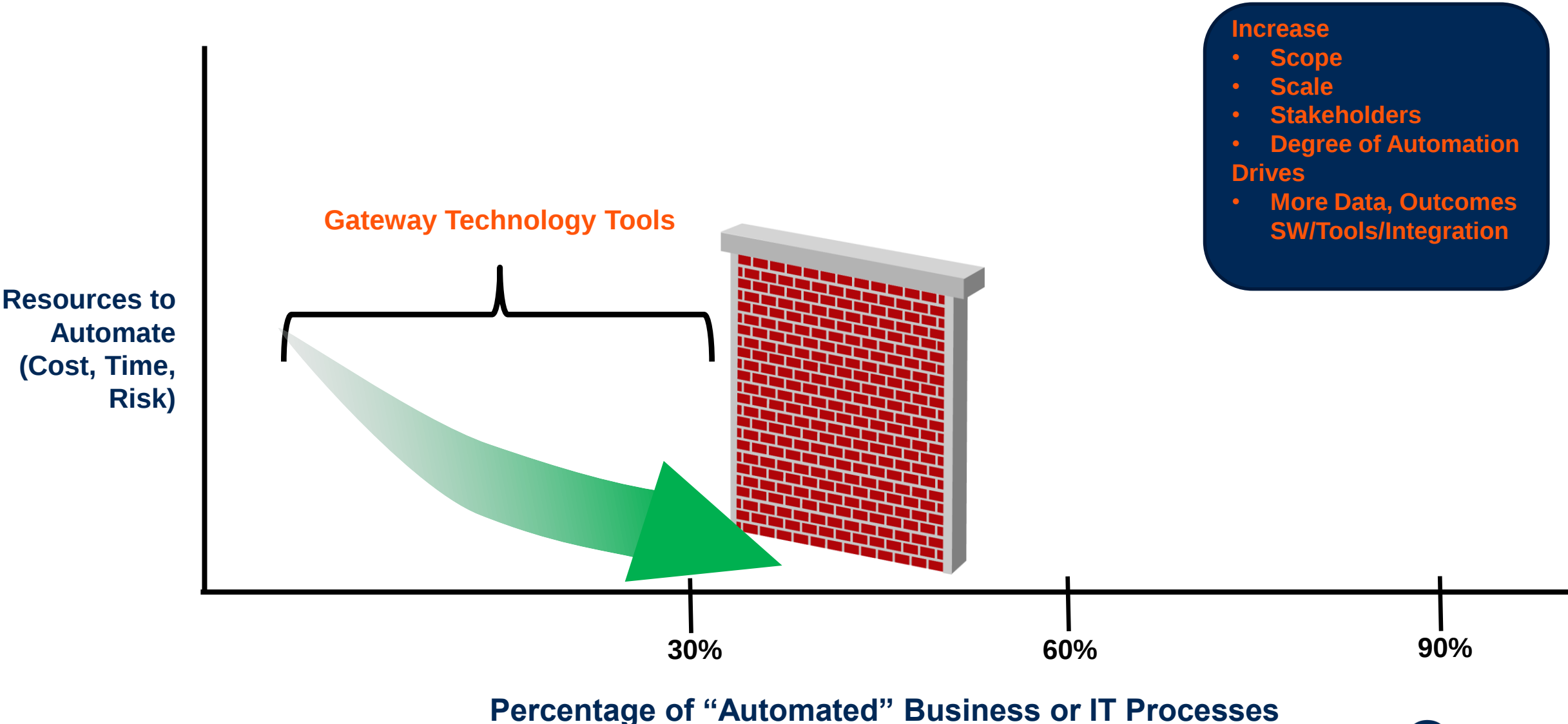
Hyperautomation Journey to Autonomous /Augmented / Automated Processes



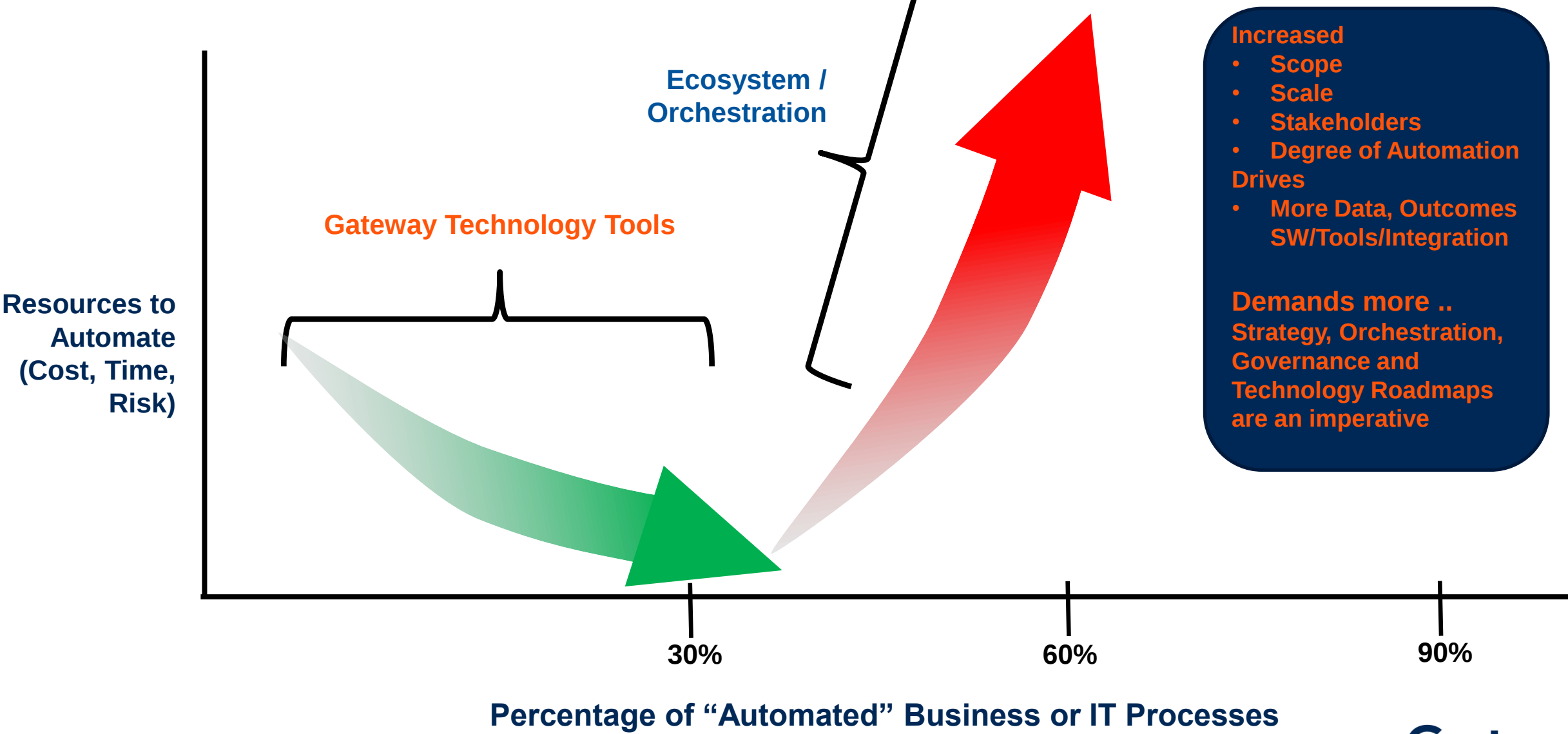
Hyperautomation Journey to Autonomous /Augmented / Automated Processes



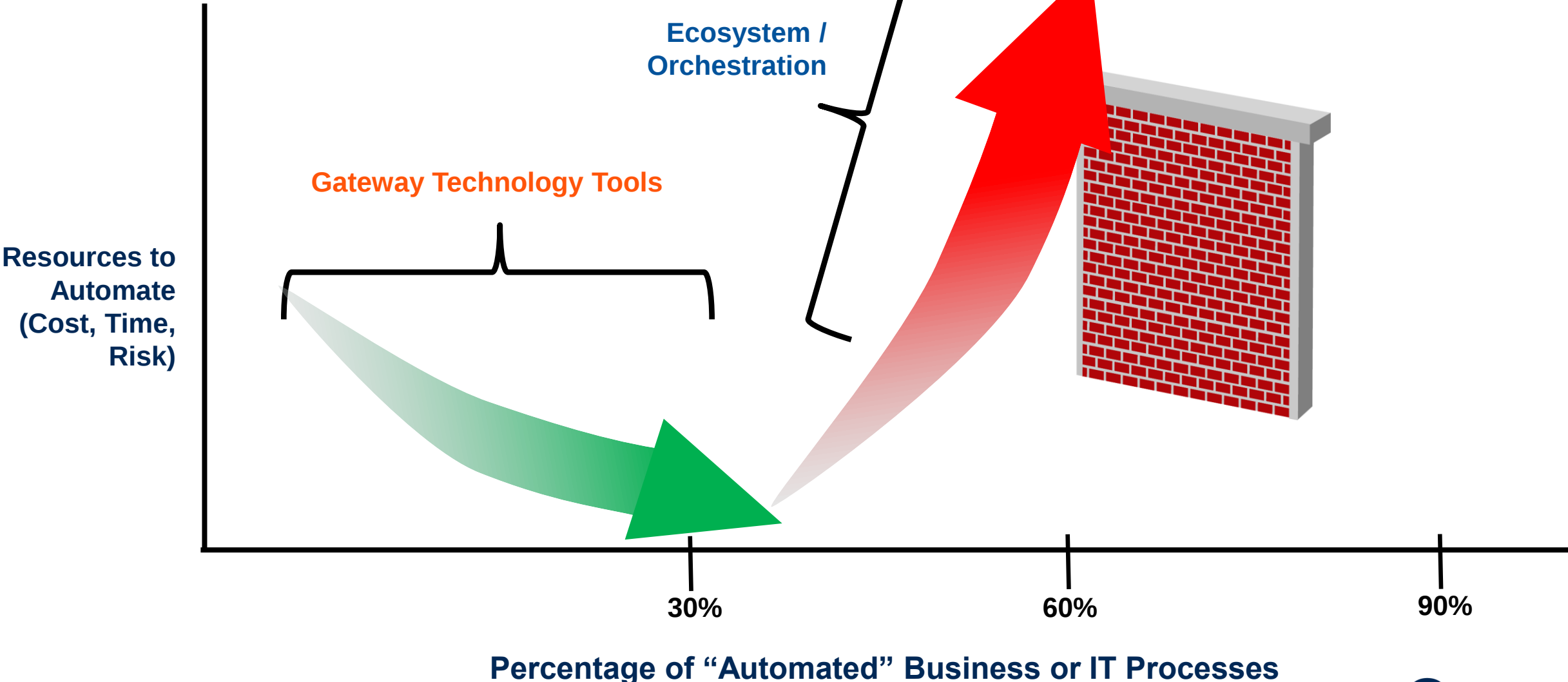
Hyperautomation Journey



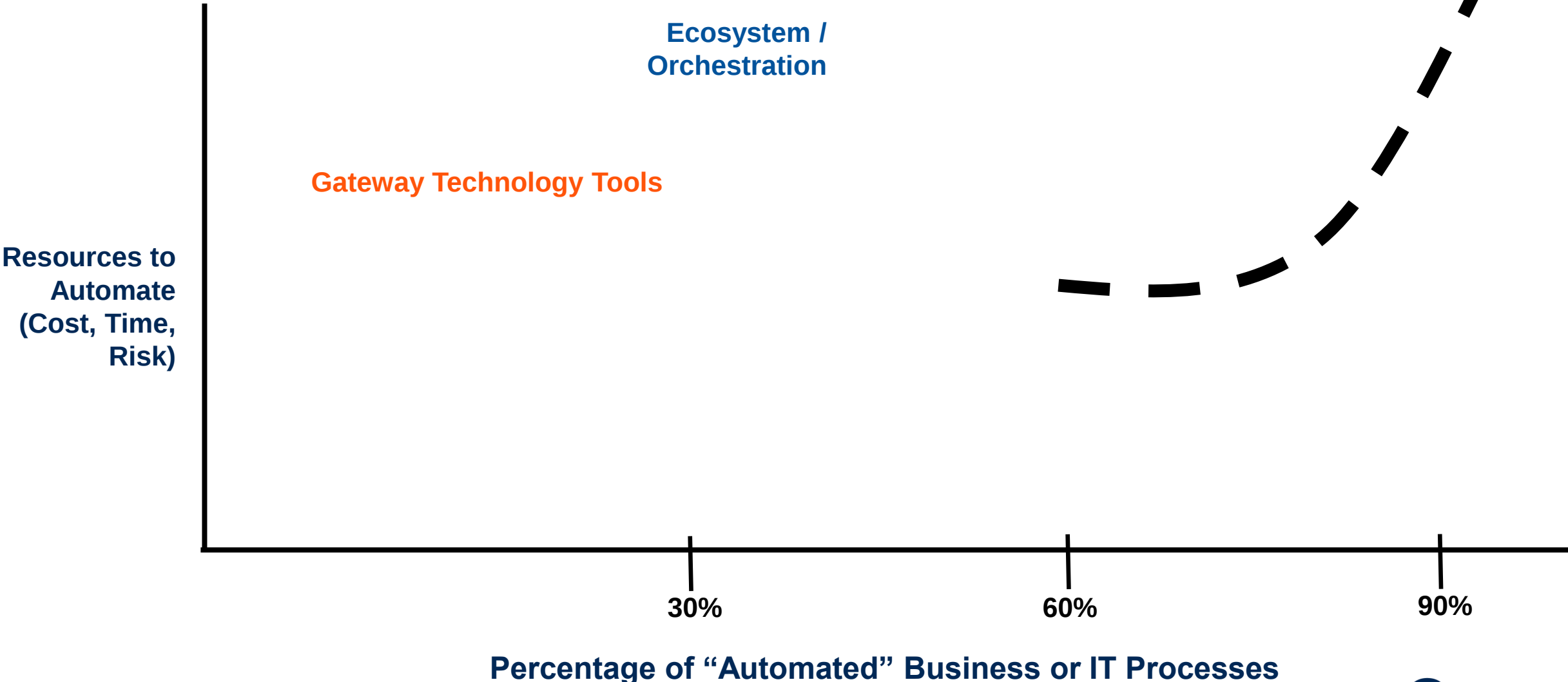
Hyperautomation Journey



Hyperautomation Journey



Hyperautomation Journey



Gartner's Hyperautomation 100 Club: Case Studies Showcasing Triple Digit Value or Benefits

Hyperautomation and Intelligent Automation investments continue unabated. However, only a small percentage of organizations can showcase value or benefits that are identifiable, traceable, and auditable.

Active Research: Capturing case studies for Gartner's Hyperautomation 100 Club which feature client examples where organization has delivered over 100 million dollars in value or triple digit benefits.

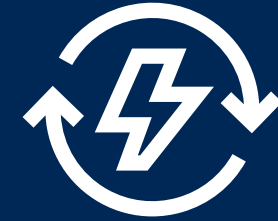
Buyer Side: Business Value



**Cost
Optimization**

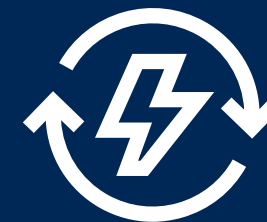


Growth



**Transform /
Business
Agility**

Business Value



Cheaper

Cost Savings /
Efficiency

Faster

Effectiveness

Better

Business Agility

Business Value

Disruption and Uncertainty increases

**Business as usual becomes riskier ..
than automation or innovation**

**Organizations that lead through turbulence with intention
will be the most successful**

***Hyperautomation Spending is
“Recession Resistant”***

Investments Bring Governance to the Forefront in Your **Hyperautomation** Journey

Governance

57%

will have **4 (four)** or more
Concurrent Hyperautomation
initiatives to manage and operate

Governance

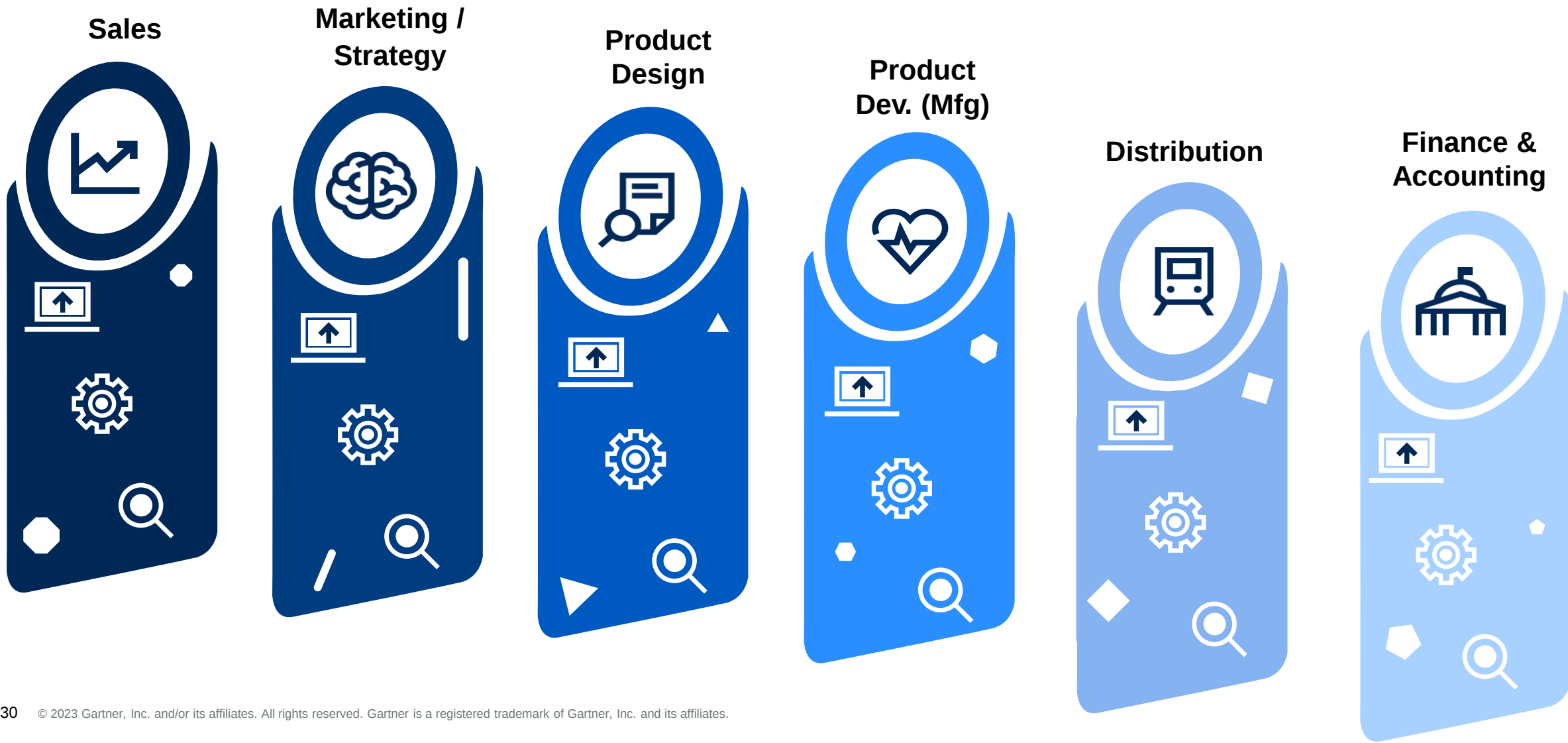
29%

will have **15 (fifteen)** or more
Concurrent Hyperautomation
initiatives to manage and operate

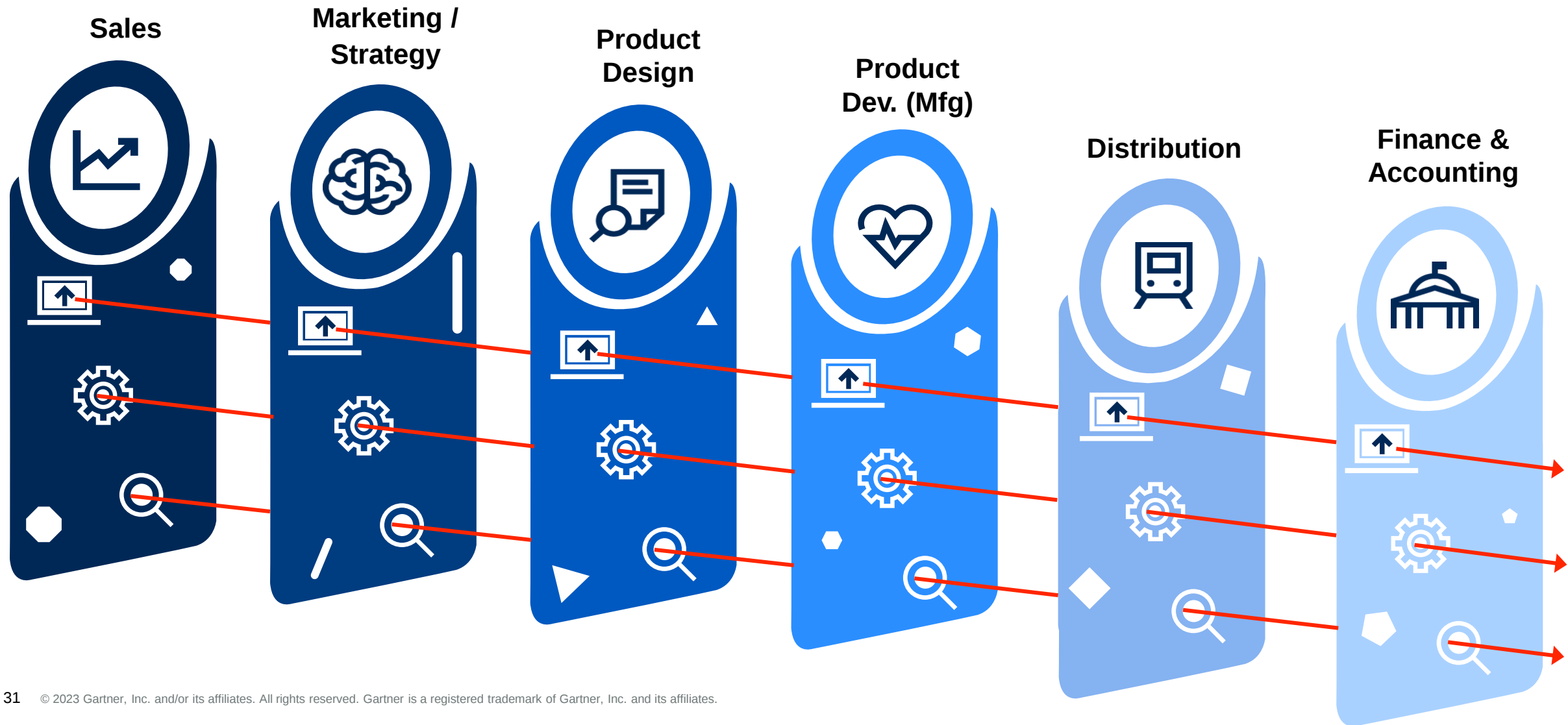
By 2024 a diffused (siloed) approach to hyperautomation initiatives will drive up initiative specific total cost of ownership by 40 fold, making adaptive governance a differentiating factor in financial performance.



Concurrent Number of Hyperautomation Initiatives



Must Pierce Across to Integrate and Orchestrate across Enterprise



New Realities

More Money ...

**... But Outside
the CIO's Budget**

More People ...

**... But Reporting
to Business Units**

**More Value, Greater
Innovation ...**

**... But NOT Driven by IT
Leaders or CIO**

Gartner Hyperautomation Core Team

IT Leaders Analysts



Frances Karamouzis

Distinguished VP Analyst

24 years at Gartner/36 years industry experience



Saikat Ray

VP Analyst

5 years at Gartner/24 years industry experience



Keith Guttridge

Sr Director Analyst

10 years at Gartner/ 28 years industry experience



Jason Wong

Distinguished VP Analyst

9 years at Gartner/26 years industry experience



Chris Sanderson

Sr Director Analyst

4 years at Gartner/ 29 years industry experience



Paul Vincent

Sr Director Analyst

6 years at Gartner/37 years industry experience

Contracting (Sourcing & VM) Analyst



Melanie Alexander

Sr. Director Analyst

6 years at Gartner/ 28 years industry experience

Gartner AI team (collaborated on Hyperautomation content)

North American Analysts



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Chief of Research and Distinguished VP Analyst
23 years at Gartner/36 years industry experience



[Erick Brethenoux](#)

Distinguished VP Analyst
5 years at Gartner/ 32 years industry experience



Bern Elliot

Distinguished VP Analyst
23 years at Gartner/45 years industry experience



[Svetlana Sicular](#)

VP Analyst
11 years at Gartner/29 years industry experience

European Analysts



Anthony Mullen

VP Analyst
7 years at Gartner/33 years industry experience



[Pieter den Hamer](#)

Sr. Director Analyst
5 year at Gartner/31 years industry experience

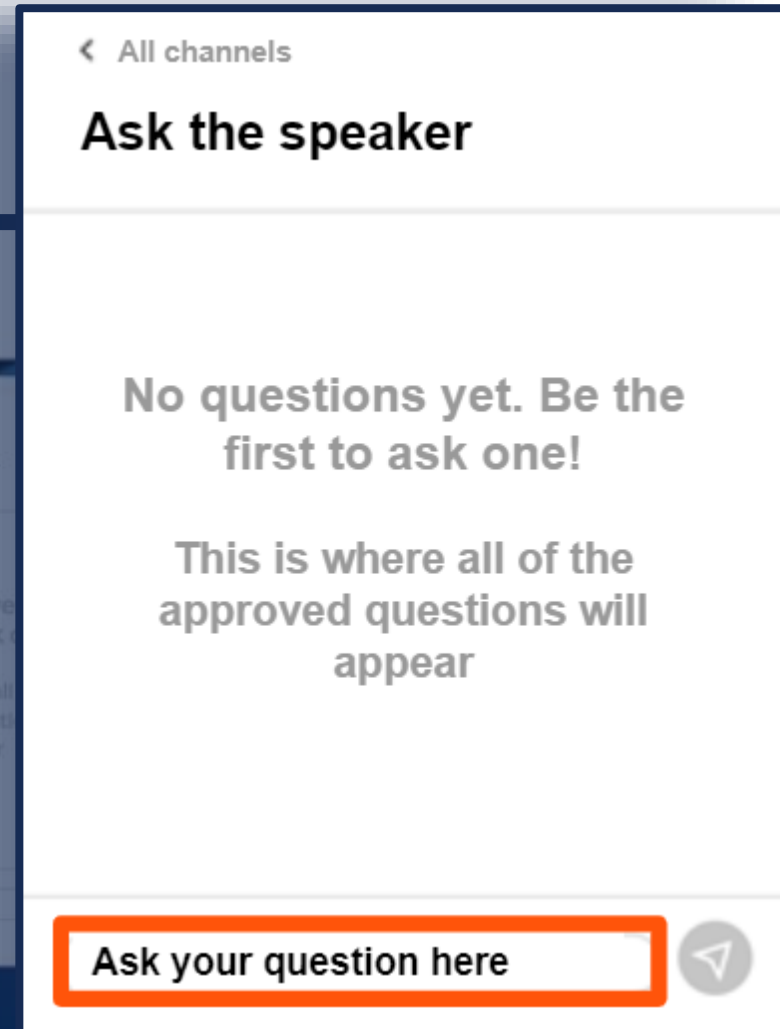
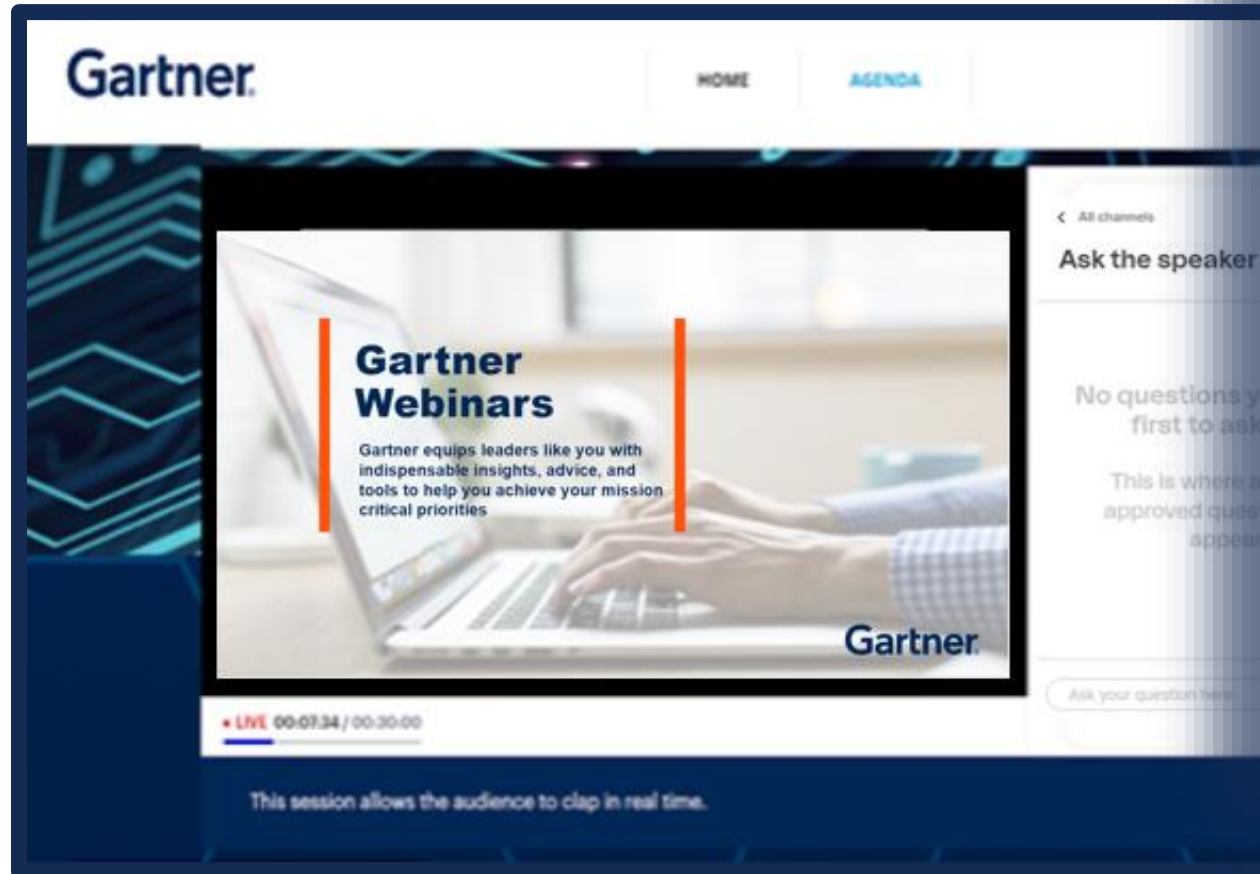
Asia Pac



[Shubhangi Vashisth](#)

Sr Principal Analyst
8 years at Gartner/15 years industry experience

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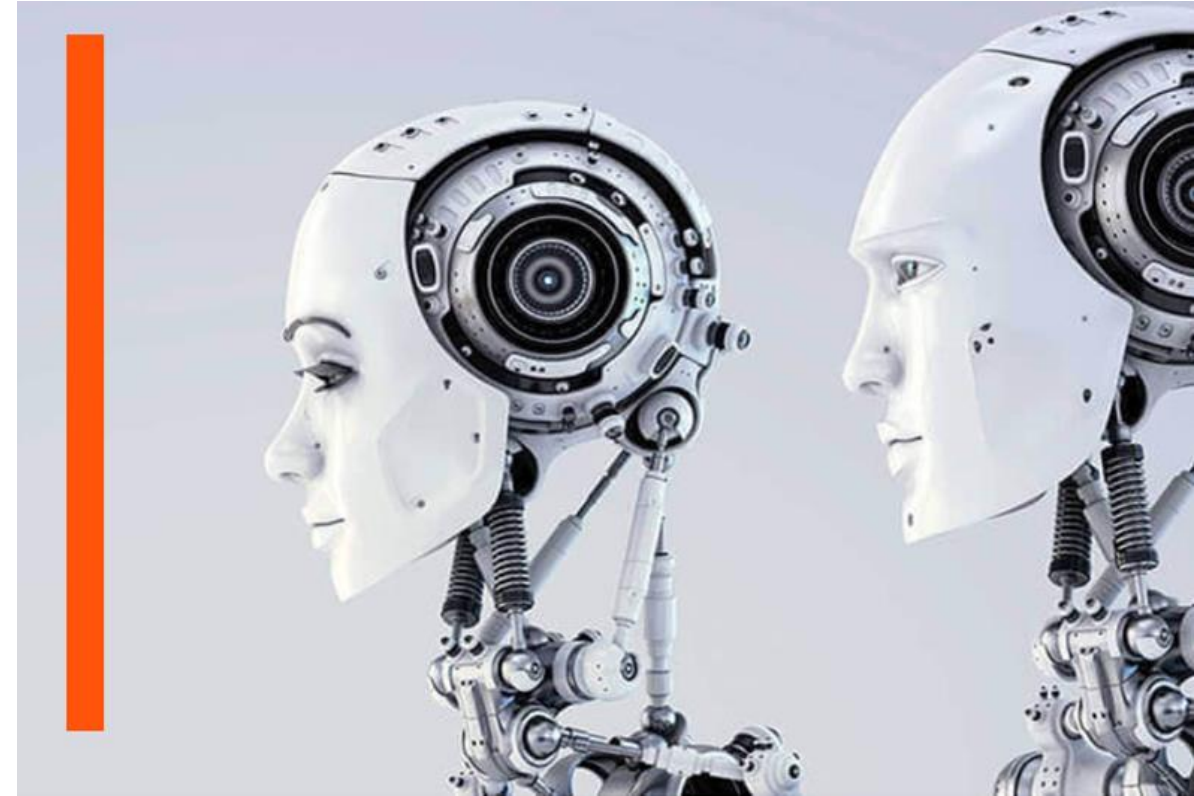


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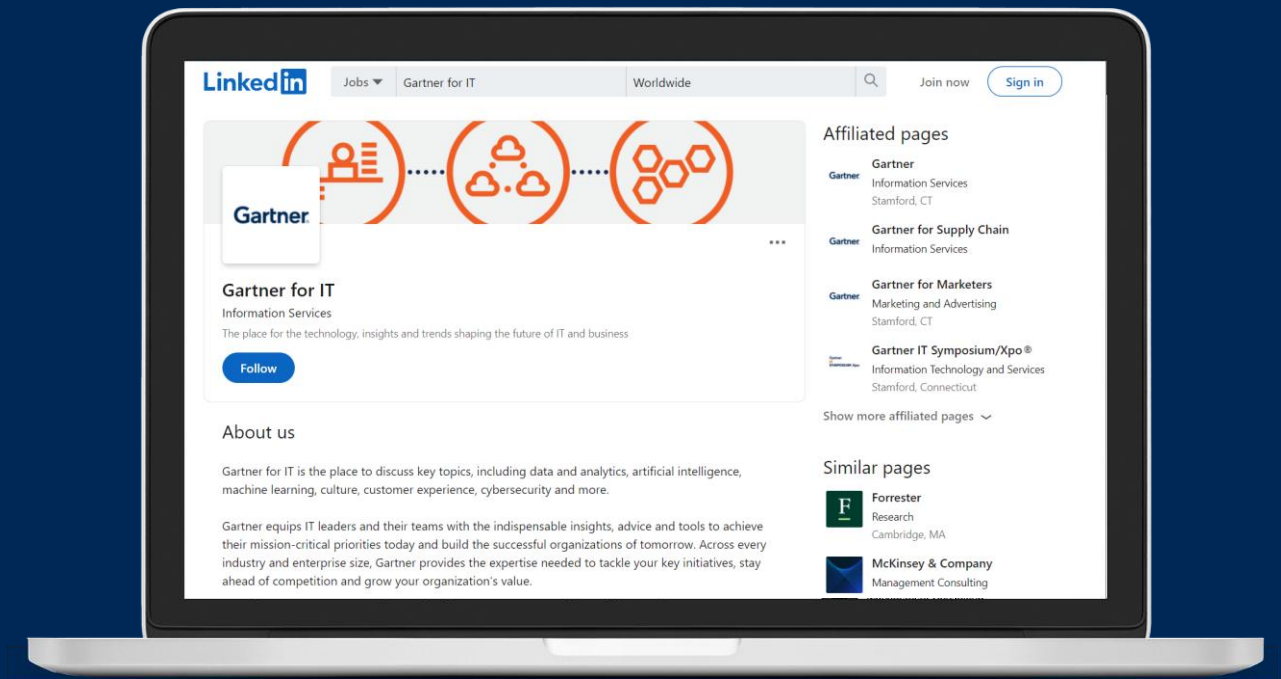
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As cloud computing evolves from technology enabler to business disruptor, IT leaders must ensure they understand their organization's business strategy. Only then can they seek opportunities to leverage new and emerging cloud capabilities to accelerate that strategy. This free webinar reveals Gartner's top predictions for where cloud computing will be by 2027, and explores how these predictions will shape your cloud value proposition.

- Explore what cloud computing will look like in 2027
- Discover how multi-cloud and cloud native can affect organizations' cloud efforts
- Ensure a successful cloud journey for your organization

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