

# Bonitasoft

Founded 2009 | HQ Paris, France | 100 employees (approx.) | \$25-50M revenue (est.)

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## The Company

Bonitasoft is an open-source digital process automation company that was founded in 2009 and is headquartered in Paris, France. The company's flagship software was originally developed in 2001 as business process and workflow software at the French National Institute for Research in Computer Science. It was then transferred to Groupe Bull and ultimately used as the platform to launch a separate company in 2009. Since then, Bonitasoft has continued to deepen its roots in the open source community, and the company now provides both free and commercial versions of its digital process automation platform.

The firm has approximately 100 employees, a strong leadership team with two executives harkening back to the research institute days, and an estimated \$25-50 million in revenues (Bonitasoft does not disclose

revenue). Bonitasoft has 300 active customers (with subscriptions) and targets specific line of business and end-to-end processes in education, energy, financial services, healthcare, manufacturing, media, public sector, retail, and telecommunications. The firm's largest markets are financial services, insurance, telecoms, and the public sector. Bonitasoft also targets horizontal business processes such as supply chain management, human resource management, and contract management.

Bonitasoft is geographically diverse, with a stronghold in Europe (particularly southern Europe), a sizeable base in Latin America (30%), and significant sales in the US (24%). Flagship customers include BBVA, Bristol-Myers Squibb, Credit Agricole, Hunter Douglas, Masmovil, and Renault. When the company started in 2009, most customers were small and medium-sized businesses, while in 2018 over 70% of its sales were in organizations with more than 5,000 employees.

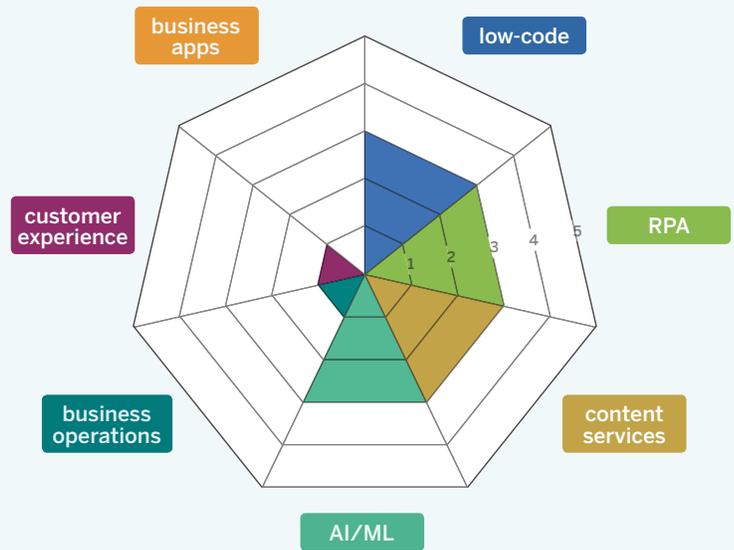
# Market and Technology Positioning

Bonitasoft's cloud, hybrid, and on-premises open-source software offers a unified but modular platform of process components that combine to support structured process automation and case management. The product is specifically designed to support asynchronous processes (i.e., critical business processes involving distributed systems). The platform includes the modeler, engine, and UI designer, which can be used separately, and two add-ons for AI and continuous delivery. The company targets automation across the enterprise. Its initial and core focus is on tools for application developers, but the firm is also now focused on delivering collaborative and monitoring capacities that provide user-friendly experiences to businesspeople.

The developers who started Bonitasoft believe that the company's biggest differentiator is supporting and integrating with tools that application developers already use. They also see open source as a big differentiator, with a community of 140,000 Bonitasoft experts, best practices for applications developers, and an online marketplace for more than 500 reusable connectors, processes, and apps.

Figure 1 provides a high-level overview of Bonitasoft's strategic positioning. (Note: this radar graphic is not a product analysis or product rating; rather, it represents vendor positioning within the digital process automation market.)

Figure 1  
Bonitasoft's Positioning



## Legend

### low-code

- 0 – no emphasis on low code
- 1 – business developer focus
- 3 – extensive low-code tooling
- 5 – general purpose low-code market

### RPA

- 0 – no RPA offering
- 1 – custom integration
- 3 – 1+ partners/OOB connectors
- 5 – deep partnership/native RPA

### content services

- 0 – no content support
- 1 – native content support
- 3 – partnership with 1+ content providers
- 5 – native content services/management

### AI/ML

- 0 – no focus on AI/ML
- 1 – initial insights/experimentation
- 3 – multiple AI/ML deployments (e.g., capture, next best action, NLP)
- 5 – native AI/ML in DPA product

### business operations

- 0 – focus on CX only
- 1 – targeting the back office
- 3 – pre-built use cases for back office
- 5 – strategic focus on complex business operations

### customer experience

- 0 – focus on biz ops only
- 1 – focus on CX for biz ops
- 3 – targeting sales and marketing
- 5 – strategic focus on end-to-end CX-centric processes

### business apps

- 0 – no focus on business apps
- 1 – pre-built templates/forms for specific processes
- 3 – 1+ pre-built apps >50% packaged
- 5 – fully packaged apps

A deeper analysis of the categories on the graph shows:

→ **Low-code tooling is targeted mainly at process-oriented application developers.**

The firm offers low-code tooling for process automation and is not pursuing the larger low-code market (i.e., separate from business process automation). This strategy comes from a belief that many process automation vendors are so focused on businesspeople that they have left application developers out of their R&D focus. As a result, the Bonitasoft platform provides: 1) extension points for developers to add their own code, 2) designer software for building the web UI, and 3) the ability to integrate process low-code tools with widely used coding tools. But in addition to application developers, Bonitasoft also focuses on low-code tooling for business analysts and business developers in DevOps: examples include the company's web composition tool and the Kanban board for tracking work.

→ **Robotic process automation (RPA) is provided through partnerships.** The firm's leadership has intentionally decided not to develop RPA software, and has instead deeply integrated its platform with UiPath. Over time Bonitasoft executives anticipate inking multiple RPA partnerships. They think that RPA has roiled the process automation market, leaving buyers confused about the differences and complementary relationship between digital process automation and RPA, and they envision greater convergence between the two markets over time. Among Bonitasoft's customers and prospects, financial services is currently the industry most interested in the intersection of RPA and process automation.

→ **Complex processes within business operations is a core focus for Bonitasoft.**

For example, the vendor implemented a complex order and project management system for a media company involving the coordination of multiple products. In the pharmaceutical sector, Bonitasoft was implemented to automate a drug discovery process that supports inter-laboratory workflows. And a software company uses Bonitasoft to provide corporate energy management to power companies for monitoring and automating energy demand based on consumption patterns.

→ **Customer experience is a new focus.**

Traditionally, Bonitasoft has viewed businesspeople as customers, but now it is also working to provide new digital experiences for the customer's customers – the end customers – delivered through process automation. One example is its recent successes in automating and delivering online banking to bank customers. Several French banks are already using Bonitasoft's platform to deliver new online banking experiences, including 100% mobile customer onboarding. In parallel, Bonitasoft's customers are beginning to emphasize business transformation and are increasingly interested in using automation to provide better experiences and outcomes for their customers.

→ **Out-of-the-box business applications are not on Bonitasoft's R&D roadmap.** In many ways, this strategy reflects the company's emphasis on helping both application developers and citizen developers (with a main focus on collaboration) to create processes that complement existing departmental and enterprise systems, and to tackle new automation needs.

→ **The firm offers AI/ML through intelligent process mining and insights into process execution.** Bonitasoft offers a native process mining capability that is configurable, and the company will continue enhancing its process mining capabilities. The platform also makes predictions about when work will be complete and provides recommendations for the next best action (e.g., which branch to take) to complete the process based on business objectives.

## Our Opinion

***Bonitasoft is taking a different path than many other process automation vendors by focusing specifically on application developers and how they collaborate with citizen developers.*** This approach differentiates the company from its competitors that are more focused on building low-code process tools for citizen developers and business analysts. Although Bonitasoft is tacking away from the conventional wisdom of targeting low-code for businesspeople, the company has clearly laid out a unique focus for its process automation platform. Bonitasoft's core strategy is to help developers work most effectively with business analysts and citizen developers. The company does this by providing an open, flexible platform that allows customers to build their own systems through a mix of process automation, RPA, and integration with other applications and development tools. Because the platform is modular, customers can decide which modules they need (e.g., some customers prefer to use their own user interface). This packaging is also attractive to firms that have an application development orientation toward process automation.



## Advice to Buyers

Put Bonitasoft on the organization's short list if you are looking for a process automation tool targeted primarily at application developers and collaboration with citizen developers, and low-code development tools. Look closely at Bonitasoft if considering an open source, cloud or on-premise process platform or contemplating process automation components (e.g., process automation engine or process mining).

### Strengths

- Deep focus on application developers
- Open source community with experienced developers, best practices, and reusable connectors, processes, and apps
- Sales emphasis on specific vertical applications providers (e.g., customer onboarding for telcos)
- Modular, expandable platform

### Opportunities

- Target additional automation for enterprise software suites (e.g., ERP, SCM, HRM, etc.)
- Deepen penetration in the public sector
- Penetrate more deeply in the installed base
- Market strategic use cases for vertical processes

### Aspirations

- Continue to close new business with larger companies (>5,000 employees)
- Add greater process mining capabilities in the near future

### Results

- Expanded beyond SMBs into larger enterprises
- Widely deployed (Europe, US, and Latin America)
- Eighty percent of customers over the past two years have had >5,000 employees

## Research Series: Digital Process Automation State of the Market

This report is part of Deep Analysis's Digital Process Automation State of the Market research series, which includes these reports:

- State of the Digital Process Automation Market: Current Assessment 2019
- State of the Digital Process Automation Market: Trends 2020-2025
- Vendor Vignettes for Digital Process Automation Vendors

# About Deep Analysis

**Deep Analysis** is an advisory firm that helps organizations understand and address the challenges of innovative and disruptive technologies in the enterprise software marketplace.

Its work is built on decades of experience in advising and consulting to global technology firms large and small, from IBM, Oracle, and HP to countless start-ups.

Led by Alan Pelz-Sharpe, the firm focuses on Information Management and the business application of Cloud, Artificial Intelligence, and Blockchain. Deep Analysis recently published the book "Practical Artificial Intelligence: An Enterprise Playbook," co-authored by Alan and Kashyap Kompella, outlining strategies for organizations to avoid pitfalls and successfully deploy AI.

Deep Analysis works with technology vendors to improve their understanding and provide actionable guidance on current and future market opportunities.

Yet, unlike traditional analyst firms, Deep Analysis takes a buyer-centric approach to its research and understands real-world buyer and market needs versus the "echo chamber" of the technology industry.

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## About the Author

Connie Moore is Vice President and Principal Analyst at Deep Analysis. She joined the firm after four years as Senior Vice President, Research, at Digital Clarity Group, and more than twenty years as Research Director and Vice President at Forrester Research. Connie is a widely acclaimed speaker, advisor, consultant, and expert in digital process automation, customer experience management, digital experience platforms, and content services. In 2014 Connie received the Workflow Management Coalition's globally recognized Marvin Manheim Award for influence, contribution, and distinction based on standout contributions to the field of workflow and business process management.