

WAVE REPORT

The Forrester Wave™: Digital Process Automation Software, Q3 2025

The 14 Providers That Matter Most And How They Stack Up

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Summary

In our evaluation of digital process automation (DPA) platform providers, we identified the most significant ones and researched, analyzed, and scored them. This report shows how each provider measures up and helps you select the right one for your needs.

AI Agents Will Drive The Next Wave Of DPA Innovation

The emergence of AI agents is reshaping DPA platforms. At the same time, the promise of low-code for citizen developers to implement DPA is largely overstated, with most DPA projects deployed by experienced professionals. Finally, while DPA governance features scored only average across most Forrester Wave™ participants, broader IT compliance tools partially cover the features. DPA customers using this evaluation to inform a purchase decision should consider that:

- **Agents are set to disrupt the DPA space.** Natural language coding, genAI-based decision management, and conversational interfaces are central to the vision and roadmap of the DPA Forrester Wave participants. While DPA vendors actively demonstrate agent-building capabilities, the most impactful solutions integrate these new agents with existing DPA strengths.
- **Professional developers lead most DPA projects.** Low-code features for development tools and process modeling have advanced through decades of DPA innovation and given citizen developers a greater role in building automation apps. That said, most of the 37 reference interviews we conducted for this Forrester Wave indicated that professional developers, not citizen developers, deployed most projects. DPA apps often include advanced decisioning, endpoint integration, orchestration, and modeling tools to build human access points. As a result, professional developers who embrace these concepts often lead DPA projects.
- **Broader governance tools partially support DPA governance.** Many organizations support DPA governance by integrating process data into their broader source code management tools, like GitHub or Jira. This means that beyond role-based access control of automation features, there is less reliance on DPA-provided governance tools. The external tools often pull DPA-related data points like process version history, deployment logs, and security configurations to maintain comprehensive oversight directly into the broader IT management systems.

Evaluation Summary

and adapt the findings based on their priorities using Forrester’s interactive provider comparison experience.

FIGURE 1

Forrester Wave™: Digital Process Automation Platforms, Q3 2025

THE FORRESTER WAVE™
Digital Process Automation Software
Q3 2025



*A halo indicates above-average customer feedback. A double halo indicates that the vendor is a Customer Favorite.

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FIGURE 2

Forrester Wave™: Digital Process Automation Platforms Scorecard, Q3 2025

		Forrester's weighting	AgilePC	Appian	Axon IV	Bizagi	Camunda	Flowable	Hyland
Current offering			2.90	4.40	2.80	3.40	3.20	2.30	2.00
DPA governance	5%	3.00	5.00	3.00	3.00	3.00	3.00	1.00	3.00
Case management support	5%	3.00	5.00	3.00	3.00	3.00	3.00	3.00	3.00
Development tools	10%	3.00	3.00	3.00	5.00	1.00	3.00	3.00	1.00
AI agent design and configuration	10%	1.00	3.00	1.00	5.00	3.00	3.00	3.00	1.00
Orchestration	15%	3.00	5.00	3.00	3.00	5.00	3.00	3.00	1.00
Maintenance, upgrades, and enhancements	5%	3.00	5.00	1.00	3.00	3.00	3.00	3.00	1.00
Large-scale and advanced processes	10%	3.00	5.00	3.00	3.00	3.00	3.00	1.00	1.00
Business rules and AI model decisioning	5%	3.00	5.00	3.00	3.00	3.00	3.00	1.00	1.00
Process modeling	10%	5.00	5.00	5.00	3.00	3.00	3.00	3.00	3.00
Process intelligence	5%	1.00	5.00	3.00	3.00	3.00	3.00	1.00	3.00
Document automation	5%	3.00	3.00	3.00	3.00	3.00	3.00	1.00	5.00
Endpoint integration	10%	3.00	5.00	1.00	3.00	3.00	3.00	1.00	3.00
Process standards	5%	3.00	3.00	5.00	3.00	5.00	5.00	5.00	3.00

Strategy		2.20	3.70	2.30	2.80	3.70	2.30	2.30
Vision	20%	3.00	3.00	1.00	3.00	5.00	3.00	3.00
Innovation	20%	3.00	3.00	3.00	3.00	5.00	3.00	1.00
Roadmap	15%	1.00	5.00	3.00	3.00	3.00	1.00	1.00
Partner ecosystem	20%	1.00	5.00	3.00	1.00	1.00	1.00	3.00
Pricing flexibility and transparency	10%	5.00	3.00	3.00	5.00	3.00	3.00	3.00
Community	15%	1.00	3.00	1.00	3.00	5.00	3.00	3.00

		Forrester's weighting	IBM	Microsoft	Newgen Software	Pegasystems	Pipefy	Salesforce	ServiceNow
Current offering			4.20	2.50	3.30	4.50	1.70	3.30	3.50
DPA governance	5%	5.00	1.00	3.00	5.00	1.00	3.00	3.00	3.00
Case management support	5%	5.00	1.00	5.00	5.00	3.00	3.00	3.00	3.00
Development tools	10%	3.00	5.00	3.00	3.00	3.00	5.00	3.00	3.00
AI agent design and configuration	10%	3.00	5.00	5.00	5.00	1.00	5.00	5.00	5.00
Orchestration	15%	5.00	1.00	3.00	5.00	1.00	3.00	3.00	3.00
Maintenance, upgrades, and enhancements	5%	3.00	3.00	3.00	3.00	3.00	3.00	3.00	3.00
Large-scale and advanced processes	10%	5.00	1.00	3.00	5.00	1.00	3.00	3.00	3.00
Business rules and AI model decisioning	5%	5.00	3.00	3.00	5.00	1.00	3.00	3.00	5.00
Process modeling	10%	3.00	1.00	3.00	5.00	3.00	3.00	3.00	3.00

The Forrester Wave™: Digital Process Automation Software, Q3 2025									
Endpoint integration		10%	5.00	3.00	3.00	5.00	1.00	3.00	5.00
Process standards		5%	3.00	3.00	3.00	3.00	1.00	3.00	1.00
Strategy			3.40	3.50	3.00	4.40	1.70	4.30	4.00
Vision		20%	3.00	3.00	5.00	5.00	1.00	5.00	3.00
Innovation		20%	3.00	3.00	3.00	3.00	1.00	5.00	3.00
Roadmap		15%	3.00	3.00	5.00	5.00	3.00	3.00	5.00
Partner ecosystem		20%	5.00	5.00	1.00	5.00	1.00	5.00	5.00
Pricing flexibility and transparency		10%	3.00	1.00	3.00	3.00	5.00	1.00	3.00
Community		15%	3.00	5.00	1.00	5.00	1.00	5.00	5.00
Scores are on a scale of 1 (below par relative to others evaluated) to 5 (superior relative to others evaluated).									
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Leaders

Pegasystems

Pegasystems (Pega) builds on its analytics strengths with its DPA offering, Infinity — an AI-powered platform designed for enterprisewide digital transformation. Pega is headquartered in Massachusetts.

- **Strategy.** Pega emphasizes its “center-out mission” for journey orchestration with its “build for change” architecture and AI decisioning, gaining superior scores for its vision and roadmap. It plans to differentiate with its Agent Experience and AgentX API tools, supported by Pega Blueprint to design and deploy automations. Pega must refocus its go-to-market strategy from predictive analytics to genAI-based decision management.
- **Capabilities.** Pega Infinity does well with sophisticated use cases. The App Factory has superior features for DPA governance, while Blueprint builds workflows from natural language, infuses best practices, and can draw from legacy systems. Agent Experience, AgentX API, and Knowledge Buddy are at the leading edge of AI agent design. Development tools remain complex because Pega’s unique architecture offers less support for standards than its competitors. Pega’s focus on “center-out” automation may inhibit a ground-up data-first approach.
- **Customer feedback.** Customer references highlight Pega’s strength in orchestrating complex workflows and its top-notch process modeling tools. They say the product lives up to its tagline of “Build for Change” with a layered architecture and composable assets. They suggest areas for improvement, such as its Constellation UX development tools, endpoint integration with applications outside of Pega, pricing transparency, and required upgrade resources.
- **Forrester’s take.** Pegasystems best suits enterprises with sophisticated transformation goals, particularly if they want to focus on customer-facing AI agents.

View Pegasystems’ detailed scorecard.

Appian

- **Strategy.** Appian's strategy focuses on merging low-code development, process automation, AI, and its data fabric into a unified AI-powered platform. It aims to accelerate digital transformation and ensure secure real-time data access and intelligent end-to-end automation. Its strategic partnership with Amazon initially focused on infrastructure hosting but has expanded to include AI support, such as Amazon Bedrock. Appian's superior roadmap focuses directly on AI integration, data fabric expansion, scalability, and developer productivity.
- **Capabilities.** Appian's advanced data support with data fabric and low-code development features is at the forefront of market initiatives; it unifies data access and includes a semantic layer to support AI models. The platform's acquired process intelligence technology, integrated as Process HQ, offers excellent governance. The process modeler features clear visual BPMN 2.0 swim lanes. While it supports decision model and notation (DMN) for decision tables, it lacks case management model and notation (CMMN). AI agents are implemented as steps in predefined automations.
- **Customer feedback.** Customers praise Appian's rapid prototyping and flexible UI development tools that streamline application changes, alongside its data fabric and orchestration capabilities that help with integration challenges like extracting data from SAP. However, customers consistently raise concerns about pricing transparency, high professional service costs, and the need for better testing of third-party and marketplace applications.
- **Forrester's take.** Appian best suits organizations that want to pursue complex and scaled DPA deployments.

View Appian's detailed scorecard.

IBM

IBM continues to refine its automation portfolio with Cloud Pak for Business Automation (CP4BA), which is the result of acquisitions, internal innovations, and updates to meet IBM standards. IBM is headquartered in New York.

- **Strategy.** IBM delivers comprehensive business automation to the market. It focuses on professional developers handling complex automations and assumes customization will occur. IBM leads with the CP4BA SaaS offering while supporting a vast on-premises installed base. IBM's solid AI vision is evolving from a skills to an agents approach, underpinned by long-standing partnerships.
- **Capabilities.** CP4BA provides a unified platform for a wide range of automation needs: Business Automation Workflow (BAW), decision intelligence, intelligent delivery platform (IDP), content services, robotic process automation (RPA), and IBM Process Mining are primary components. Cloud infrastructure services are based on Red Hat OpenShift, while decision intelligence is based on Automation Decision Services. Blueworks Live is a process modeling tool that can export BPMN to multiple BAW workflows with process intelligence tools on the roadmap. CP4BA relies on watsonX Orchestrate, an automation endpoint separate from CP4BA, to build AI agents.
- **Customer feedback.** Customers highlight IBM's stability, reliability, case management, and governance as key features and find BAW intuitive and scalable for various workflows. While its consumption-based pricing is transparent, some customers want unified access to development UIs

- **Forrester's take.** IBM best suits enterprises with sophisticated use cases that require broad DPA functionality and deep industry expertise.

[View IBM's detailed scorecard.](#)

Salesforce

Salesforce provides a unified automation platform that integrates with its domain-specific sales, marketing, and service clouds. Salesforce is headquartered in California.

- **Strategy.** Salesforce's go-to-market strategy focuses on Salesforce administrators to expand DPA and strengthen its presence in line-of-business domains. Core to this approach is the early adoption of AI agents via Agentforce. Salesforce's vision is to unify deterministic and nondeterministic automation on a single platform: This approach, combined with its extensive partnerships and market presence, can accelerate automation, integration, and application development. Salesforce's DPA innovation strategy builds on its unique position at the intersection of CRM, data, and AI.
- **Capabilities.** Flow provides a complete process automation platform anchored by its solid orchestration, business rules, and integration capabilities. Action Hub supports administrators for troubleshooting and performance. Intelligent document processing provides enhanced document automation and process modeling with genAI. However, Agent Builder — the integrated development environment (IDE) for deploying AI agents — needs better integration with Flow.
- **Customer feedback.** Customers say that Salesforce's development tools offer improved efficiency through consistent UIs and strong data integration, while MuleSoft simplifies orchestration. However, they report challenges with upgrades from legacy Flow installations and express concerns about pricing transparency, noting the pressure to migrate existing repositories to Data Cloud to work best with Agentforce.
- **Forrester's take.** Salesforce DPA is a strong choice for enterprises with medium-complexity use cases and should be evaluated over time for deep deployments.

[View Salesforce's detailed scorecard.](#)

ServiceNow

ServiceNow delivers unified AI-powered digital workflows to automate work. It has deep roots in IT and employee service management. ServiceNow is headquartered in California.

- **Strategy.** ServiceNow's strategy is to enhance its mature DPA product, extending its roots in IT to new verticals via a focus on AI agent transformation. ServiceNow wants to be the premier AI platform for business transformation through dynamic workflow and AI agent orchestration. Progress is evident with data-powered endpoint connections and enterprise-grade management and governance.
- **Capabilities.** The ServiceNow AI Platform is offered as SaaS on the ServiceNow cloud and public clouds (Amazon Web Services, Azure, Google Cloud Platform), with options for on-premises customers. Process modeling is strong, thanks to a combination of Workflow Studio, ServiceNow Studio, and the

and knowledge graph capabilities to organize data points rather than require customers to migrate data to its cloud. It supports BPMN and CMMN modeling but not DMN.

- **Customer feedback.** ServiceNow users highlight its ease of integration across applications, strong native dashboards with an AI interface, and DPA vertical packaging. While Agent Studio's backend configuration is robust, customers would like more transparent pricing and improved UIs for newer features.
- **Forrester's take.** ServiceNow DPA best suits organizations with substantial ServiceNow investments that are looking to improve efficiency in midscale medium-complexity workflows.

[View ServiceNow's detailed scorecard.](#)

Strong Performers

Camunda

Camunda's heritage remains rooted in the principles of open-source development and collaboration. It is headquartered in Berlin.

- **Strategy.** Unlike many DPA tools that highlight low-code features, Camunda targets professional developer efficiency: Its product and go-to-market strategy focus on end-to-end orchestration for complex and scaled use cases. This focus on endpoint orchestration provides a strong foundation for its excellent vision and innovation, which include a unique approach to agentic orchestration based on BPMN. Free trials and competitive price points have accelerated adoption. However, Camunda needs to recruit more high-end partners.
- **Capabilities.** The Zeebe workflow engine has an event-driven architecture and earns top marks for orchestration with a distributed and stateful approach. This provides data persistence and redundancy without relying on a central database. The platform supports container-based deployments on Kubernetes platforms, including Amazon EKS, Azure Kubernetes Service, and IBM Red Hat OpenShift. RPA and IDP are now native but basic. Model development tools for UI lag. Governance data is available through the process modeler, administrative, and monitoring views, but it would benefit from unification.
- **Customer feedback.** Customers praise Camunda's strong support, knowledgeable staff, and effective orchestration, though they note that endpoint monitoring outside of the Camunda app could improve. While its BPMN-based process modeler is adequate, customers say that it needs to enhance its UI development tools and that its genAI support for process design lags competitors'.
- **Forrester's take.** Camunda best suits enterprises with professional developers who want to automate complex processes and require best-in-class orchestration.

[View Camunda's detailed scorecard.](#)

Newgen Software

Newgen Software offers a DPA platform that integrates content, case management, document automation, and AI. Its top vertical is financial services, and most revenue comes from Asia Pacific and the Middle East. Newgen Software is headquartered in New Delhi.

strong, but it must improve packaging innovations for customer use. Its value-based pricing is innovative but could be more transparent. While it has advanced in terms of partnerships, its community support is light with limited customer input.

- **Capabilities.** The NewgenONE Platform provides DPA, RPA, IDP, and enterprise content management via SaaS and private cloud. Content integrates seamlessly with process automation tools, and it supports contract management, onboarding, and loan origination. The process modeler has an abstract view for citizen developers and a BPMN view for professionals but could be more intuitive. Native connectors for banking and insurance applications are strong. Newgen has several AI agents in production that it built with its data science platform; it originally built them for ML but has expanded them for genAI with knowledge graph models.
- **Customer feedback.** Customers value Newgen for critical applications due to its reliability, cost-effectiveness, and flexibility for custom extensions. While the vendor offers well-priced resources, customers want more transparent pricing, out-of-the-box reporting, and more intuitive process modeling.
- **Forrester's take.** Newgen offers a complete, well-priced process platform that delivers rapid enhancements and compelling value, especially for financial services firms that need content, process, and case management.

View Newgen Software's detailed scorecard.

Bizagi

The Bizagi Automation Platform is a standards-based offering that enables business users and IT to build complex end-to-end processes. Bizagi is headquartered in Washington, DC, with a strong presence in Latin America and a growing business in the US and EMEA.

- **Strategy.** Bizagi's vision is to deliver next-generation automation and business value: It positions itself as a smart provider that offers rapid deployment and value realization. Bizagi has a strong foothold in Latin America and experience in regulated environments, particularly banking. Bizagi emphasizes trust in AI and security. Its challenges lie in its comparatively small partner ecosystem and community.
- **Capabilities.** The Bizagi Automation Platform offers compelling tools geared to professional developers, including support for vendor-branded mobile apps. Bizagi supports BPMN 2.0 and the DMN standard but lacks support for CMMN. It provides strong governance capabilities aided by an Experience Matrix, a visual map connecting stakeholders, systems, and business objects. The platform prioritizes core workflow elements over adjacent capabilities such as process intelligence. It also partners to offer broad intelligent automation.
- **Customer feedback.** References praise Bizagi's straightforward quick-to-deploy workflows and transparent consumption-based cloud pricing. Bizagi Apps is a low-code modeling tool that allows you to embed management reports from Power BI and Tableau. Customers remain satisfied with its core process modeling and workflow orchestration.
- **Forrester's take.** Bizagi is a good fit for customers looking for process-driven applications with core workflows at a good price point, particularly for those aligned with the Microsoft Azure ecosystem.

Microsoft

Power Automate is part of the Power Platform, a suite of low-code tools for professional IT and business technologists. This includes Power Apps, Power Pages, Power BI, and Power Virtual Agents. Microsoft is headquartered in Washington.

- **Strategy.** Power Automate's momentum continues as Microsoft expands its Office 365 footprint. Microsoft's DPA competitiveness draws on its excellent sourcing power and client commitment to the platform. Microsoft's vision, innovation, and roadmap tightly focus on democratizing automation in its ecosystem — an effective strategy. However, a lack of top-tier professional service relationships inhibits deeper process targets.
- **Capabilities.** Power Automate is available as a SaaS offering. It includes RPA, IDP, and process intelligence, with a focus on low-code and citizen deployment rather than case management and orchestration. It democratizes advanced automation primarily through AI Builder, which enables developers to infuse AI into their workflows with prebuilt models for tasks like document processing. GenAI capabilities via Copilot and Azure OpenAI integration boost the product's AI potential.
- **Customer feedback.** While customers appreciate the price and ease of use for citizen developers on contained automations, they have concerns about the cohesiveness of Microsoft's tools across its portfolio. This results in overlapping features and integration challenges. Customers also report performance and reliability issues with complex high-volume workflows, and they would like simpler, more transparent pricing.
- **Forrester's take.** Microsoft is a good fit for small teams that need a general-use low-code DPA platform, particularly those already committed to the Microsoft stack.

[View Microsoft's detailed scorecard.](#)

Axon Ivy

Axon Ivy's customers are largely from regulated industries like utilities, the military, and banking and are concentrated in Germany, Austria, and Switzerland. It is part of Ricoh and headquartered in Zug, Switzerland.

- **Strategy.** Axon Ivy's goal is to be a trusted partner for digital transformation, with a flexible platform to automate complex human-centric processes across diverse systems. Its roadmap execution and partnerships received a boost from the Ricoh acquisition. However, its regulated customer base constrains both its innovation and vision. While its partner ecosystem of Ricoh resellers is vast, it needs support for the more complex DPA go-to-market execution.
- **Capabilities.** Process modeling has genAI support and visualization through BPMN standards, swim lanes, role-based views, context-aware wizards, and diagnostic aids. Axon Ivy offers somewhat limited out-of-the-box case management packages and uses its own Case Map notation as an alternative to CMMN. It lacks native support for business rules but integrates with Drools. AI agent development lags. Axon Ivy is a platform for building a variety of process use cases with strong low-code features.

support. However, they note some difficulties with upgrades and a lack of pricing flexibility.

- **Forrester's take.** Axon Ivy is a strong choice for organizations in highly regulated environments, supporting frequent customizations with a flexible approach.

View Axon Ivy's detailed scorecard.

AgilePoint

AgilePoint's DPA platform is designed to create enterprise-grade automations. It is headquartered in California.

- **Strategy.** AgilePoint's vision is to merge AI with predefined workflows to drive key business outcomes. As a small and bootstrapped firm, its roadmap investment is small, compared with its competitors'. The company's community breadth and partner network are also small. Pricing flexibility and transparency are built into core processes and the company culture.
- **Capabilities.** AgilePoint's strongest feature is its swim-lane process modeler with prebuilt tasks, connectors, and workgroup collaboration. The platform provides a composable multilayered architecture accessible to citizen developers at a lower cost than others in the market. DPA governance includes an AI control tower that supports trust factors, such as explainability with a model and audit view. Development tools are form centric. It uses partners to satisfy clients' document automation and process intelligence needs. AgilePoint doesn't support CMMN.
- **Customer feedback.** AgilePoint's platform provides exceptional process automation, with customers praising its intuitive user-friendly low-code environment and solid workflow engines. They say that its cost-effective and flexible pricing, strong development tools, and integration with enterprise apps make it ideal for quickly modeling complex business processes. AgilePoint is a Customer Favorite in this evaluation.
- **Forrester's take.** AgilePoint is a good fit for organizations that want a strong and intuitive automation engine that gives citizen developers a friendly low-code platform that can model medium- and high-complexity business processes.

View AgilePoint's detailed scorecard.

Contenders

Flowable

Flowable is an open-source foundation and standards-based platform. More than 50% of its revenue comes from financial services, particularly in Europe and North America. Flowable is an enterprise software company headquartered in Switzerland.

- **Strategy.** Flowable's DPA platform incorporates a standards-based approach developed on top of Flowable's open-source APIs. The open-source community has 10,000 active contributors. Its partner network is small, compared with others', with consulting available from the Flowable professional services team. Flowable takes a governance-first approach to AI, allowing enterprises to deploy agents

- **Capabilities.** Flowable offers an open-source and enterprise version of the platform. Both are built on open standards including BPMN, CMMN, and DMN. It supports full process modeling and import/export capabilities, advanced low-code, and enterprise grading tools. While its Services Registry coordinates endpoints for orchestration, development tools for responsive forms, dashboards, and mobile apps could be more flexible. Partnerships handle adjacent support, such as process intelligence and document automation. Flowable's non-SQL repository feeds unstructured data to AI Studio for auditable prebuilt AI agents.
- **Customer feedback.** Customer references appreciate Flowable's low starting price, scalability, strong vendor engagement, excellent training materials, and transparent/flexible pricing. They say that the platform's fluid data storage is a strong point for nondevelopers, and some note that its standards-based approach requires fewer specialized developers.
- **Forrester's take.** Flowable best suits enterprises with precise processes that need a strong technical foundation and an API-first approach with a flexible architecture, particularly for financial services use cases.

[View Flowable's detailed scorecard.](#)

Hyland

Hyland automates mission-critical content-based apps. Its roots are in content services and IDP. Hyland is headquartered in Ohio.

- **Strategy.** Content Innovation Cloud centers on knowledge-based search of content, intelligent document processing, and process automation and unifies capabilities from Alfresco, Hyland Automate, Nuxeo, OnBase, and Perceptive Content. Hyland has a strong community and partnerships based on decades of steady growth in the content management market, but it would benefit from more strategic system integrator partnerships relevant to DPA. Its focus on industry-specific applications in healthcare, education, and financial services positions it well for the future.
- **Capabilities.** Hyland excels in document automation and is best described as a content-driven platform where capture (traditional, forms, and IDP) remains an anchor. It offers task mining via RPA as well as document IDP with a 2025 genAI-based version. BPMN-based low-code modeling is designed for nontechnical users, with swim lanes, process wizards, prompt-driven design assistance, and views for diagnostics and refinement. Hyland needs to refresh core DPA criteria, such as process modeling, development tools, and orchestration, to keep pace with the DPA field. It risks falling behind in AI agent design and deployment.
- **Customer feedback.** Customers report challenges with time-consuming upgrades, less transparent pricing, and support staff who lack platform expertise, compared with Hyland's competitors. While they see its vision lagging in areas like AI agents, references consistently view the vendor as reliable and trustworthy.
- **Forrester's take.** Hyland best suits medium-complexity broad deployments that involve content and documents.

[View Hyland's detailed scorecard.](#)

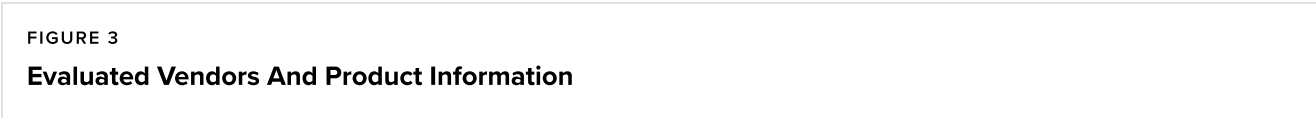
headquartered in California.

- **Strategy.** Pipefy focuses on low-code as its primary differentiation as a midmarket SaaS offering, resulting in narrower vision and innovation goals. Its strategy is to democratize digital transformation for nontechnical users and help them build workflows with embedded AI agents. This approach emphasizes user autonomy and continuous platform adaptability, positioning Pipefy as an agile solution for the midmarket. It underpins its strong vertical focus and functional specialization with templates for agents, case management, and industry-specific workflows, such as HR and financial services.
- **Capabilities.** Pipefy’s DPA governance is basic, with roles and permissions visible via an administrative console. Pipefy doesn’t follow BPMN, CMMN, or DMN standards. It instead emphasizes low-code tools to visually design Pipes (or process flows). It supports RPA, IDP, and process intelligence, with embedded integration platform as a service supported through partnerships with vendors like Workato and Zapier. Pipefy offers support for building embeddable forms but has limited development tools for standalone mobile apps. The product lacks a dedicated IDE or agent studio but can use genAI for design and documentation.
- **Customer feedback.** References provide positive feedback on the ease of use and value of Pipefy’s low-code approach. All cite significant citizen development success. They say that pricing is transparent and clear, with no upgrades or maintenance, but the solution could benefit from more native automation features, such as IDP and RPA.
- **Forrester’s take.** Pipefy is a good option for midmarket companies and small enterprises that want medium-complexity workflow automation, particularly for citizen development initiatives.

View Pipefy’s detailed scorecard.

Vendor Offerings

Forrester evaluated the offerings listed below (see Figure 3).



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The Forrester Wave™: Digital Process Automation Software, Q3 2025

AgilePoint	AgilePoint NX v9 SU1
Appian	Appian Version 25.1
Axon Ivy	Axon Ivy Version 12
Bizagi	Bizagi Automation Platform (spring 2025)
Camunda	Camunda 8.7
Flowable	Flowable Platform v3.17
Hyland	Hyland Content Innovation Cloud (0.875.1.1-8d59046)
IBM	IBM Cloud Pak for Business Automation; IBM watsonx Orchestrate
Microsoft	Microsoft Power Automate
Newgen Software	NewgenONE 2024.2
Pegasystems	Pega Infinity 24.2
Pipefy	Pipefy
Salesforce	Salesforce Flow
ServiceNow	ServiceNow AI Platform, including App Engine and Workflow Data Fabric (Yokohama release, March 2025)

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Evaluation Overview

We evaluated vendors against three categories:

- **Current offering.** Each vendor’s position on the vertical axis of the Forrester Wave graphic indicates the strength of its current offering.
- **Strategy.** Placement on the horizontal axis indicates the strength of the vendors’ strategies, including elements such as vision and innovation.
- **Customer feedback.** A halo on a vendor’s marker indicates above-average customer feedback relative to the other evaluated vendors. A double halo indicates outstanding customer feedback: We consider the vendor to be a Customer Favorite. As part of this evaluation, we speak with up to three customers of each vendor. We also consider customer input from our previous research.

Vendor Inclusion Criteria

Each of the vendors we included in this assessment has the following:

- **Modeling environment.** The vendor has a formal modeling environment with the ability to build and visualize a process, continuously improve, orchestrate, and manage going forward.
- **Geographic presence.** The vendor is present in at least two of the following geographies, either directly or through partners, and each of the geographies contributes to at least 15% of its annual DPA

- **Capabilities.** The vendor can handle complex long-running processes and support automation fabric principles, including scalability, process complexity, and variability. It has a track record of deploying large numbers of apps at scale, including support for principles such as data and event-driven processes, governance, and native end-to-end orchestration and visibility.
- **Adjacent capabilities.** The vendor can handle a complex ad hoc environment. It has native support for noncore but adjacent automation capabilities such as RPA, rules/decision modeling, collaboration, IDP, and process mining. It also has genAI support for design, development, AI agent support, and model decision-making.
- **Mindshare among Forrester's enterprise clients.** Forrester's clients frequently mention the product as one they are considering prior to a purchase. We have heard about the product from our clients in the form of inquiries, advisories, consulting engagements, and other interactions over the past year. Other vendors mention this vendor as a competitor.

Other Notable Vendors

The Forrester Wave evaluation is an assessment of the top vendors in the market; it doesn't represent the entire vendor landscape. You'll find more information about this market and additional vendors that Forrester considers to be notable for enterprise clients in our corresponding report: The Digital Process Automation Software Landscape, Q2 2025.

Supplemental Material

The Forrester Wave Methodology

A Forrester Wave is a guide for buyers considering their purchasing options in a technology marketplace. To offer an equitable process for all participants, Forrester follows The Forrester Wave™ Methodology to evaluate participating vendors.

In our review, we conduct primary research to develop a list of vendors to consider for the evaluation. From that initial pool of vendors, we narrow our final list based on the inclusion criteria. We then gather details of product and strategy through a detailed questionnaire, demos and briefings, and interviews with customers (vendors may provide up to three reference customers; we also consider feedback from other customers we've spoken with). We use those inputs, along with the analyst's experience and expertise in the marketplace, to score vendors, using a relative rating system that compares each vendor against the others in the evaluation.

We include the publishing date (quarter and year) clearly in the title of each Forrester Wave report. We evaluated the vendors participating in this Forrester Wave using materials they provided to us by June 12, 2025, and did not allow additional information after that point. We encourage readers to evaluate how the market and vendor offerings change over time.

In accordance with our vendor review policy, Forrester asks vendors to review our findings prior to publishing to check for accuracy. We score vendors that met our defined inclusion criteria but declined to participate in or contributed only partially to the evaluation in accordance with our vendor participation policy and publish their positioning along with those of the participating vendors.

public information, data gathered via briefings, and independently sourced customer interviews to score the vendor. We may ask the vendor for an abbreviated briefing and/or to provide reference customers. We may also rely on estimates to score vendors.

Integrity Policy

We conduct all our research, including Forrester Wave evaluations, in accordance with the integrity policy posted on our website.

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