Everest Group®

State of the Market | Service Optimization Technologies

Enabling Data-based Process DNA Analysis – Process Mining State of the Market Report 2021

August 2021: Complimentary Abstract / Table of Contents

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Contents

1.	**Introduction and overview**	**5**
	• Research methodology	6
	• Key information on the report	7
	• Background of the research	8
	• How to read this document	9
2.	**Summary of key messages**	**10**
3.	**Introduction to process mining**	**15**
	• Understanding process mining solutions	16
	• Advantages and limitations	18
	• Applications and benefits of process mining solutions	25
4.	**Process mining market overview**	**26**
	• Process mining software market size and growth by revenue	27
	• Adoption by buyer geography	28
	• Adoption by buyer industry	29
	• Adoption by business process/function	30
	• Process mining use cases	31
	• Total number of clients and adoption by buyer size	32
5.	**Buyer insights**	**33**
	• Drivers for process mining adoption	34
	• Overall buyer satisfaction	35
	• Product capability priority matrix	36
	• Key strengths and areas of improvement	37
	• Key barriers to adoption and best practices	38

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Contents

6. **Process mining solution characteristics** **40**
   - Elements of solution characteristics 41
     - Training & support 42
     - Talent 43
     - Partner ecosystem 45
     - Deployment model & product architecture 48
     - Commercial model 50
7. **Process mining product capabilities and trends** **52**
8. **Process mining provider landscape** **59**
   - Market share and growth by license revenue 60
   - Market share and growth by number of clients 61
   - Providers with the largest share of process mining software revenue in the top industry verticals 62
   - Providers with the largest share of process mining software revenue in major geographies 63
   - Providers with the largest share of process mining clients across buyer segments 64
9. **Task mining market overview** **65**
   - Market size and adoption trends 66
   - Solution characteristics 70
   - Provider landscape 75
10. **Outlook for 2021-22** **76**
11. **Appendix** **80**
    - Glossary 81
    - Research calendar 83

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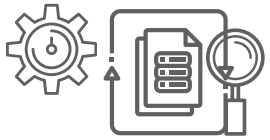
Background of the research

Everest Group defines Process Mining (PM) as a software product that involves a fact-based approach to help discover, monitor, and optimize as-is processes by analyzing process-related information from event logs generated by information systems (ERP, CRM, etc.) and/or recordings of activities performed by users on their desktops. Process mining has been one of the fastest growing markets in the intelligent automation space over the past few years. Process mining products find a wide variety of use cases from different business functions and verticals. Adoption of process mining solutions can not only help enterprises achieve cost savings and operational efficiency by identifying process optimization/automation opportunities, but also improve workforce productivity and enhance customer experience. These products are also rapidly evolving in the sophistication of their capabilities, features, and functionalities.

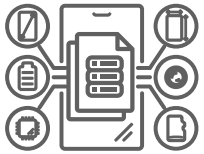
In this study, we investigate the state of the process mining market and focus on:



Introduction to process mining

Process mining market overview

Buyer insights



Process mining solution characteristics

Process mining product capabilities and trends

Process mining provider landscape

Task mining market overview

Outlook for 2021-22

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Overview and abbreviated summary of key messages (page 1 of 2)

This research provides process mining buyers, software providers, and third-party enablers (service providers and system integrators) a detailed view of the process mining market and analyzes it across dimensions, including market size and adoption trends (for both classic and desktop process mining), solution characteristics, product capabilities and trends, provider landscape, and outlook for 2021-22.

Some of the findings in this report, among others, are:

Introduction to process mining

- Process mining solutions can be classified into three categories – classic process mining, desktop process mining / task mining, and hybrid process mining. This is driven by the nature of process data collected, scope of insights generated, and the associated use cases
- Process mining solutions help overcome the limitations of manual techniques and challenges in building a healthy transformation pipeline and offer a range of business, operational, and cost benefits to enterprises

Process mining market overview

- The global process mining software market posted a 60-70% YoY growth and reached US$320-340 million in 2020
- Continental Europe and North America continue to dominate the process mining market, with North America leading in terms of growth rate
- Manufacturing, BFSI, and healthcare industries are the leading adopters of process mining solutions, accounting for more than 50% of the market share

Buyer insights

- Optimizing operations and enhancing customer experience are the key factors driving enterprise adoption of process mining solutions. Buyers are satisfied with their providers in helping achieve these drivers/objectives
- Many buyers acknowledge ease of product use as a key strength; however, they expect providers to improve advanced analytics capabilities

Process mining solution characteristics

- Europe continues to be the major talent hub, given the origin of several providers from here. Other geographies are experiencing higher growth as providers look to expand global presence
- Greater flexibility to scale deployments and low upfront investments are driving the shift in adoption toward subscription-based licensing models

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Overview and abbreviated summary of key messages (page 2 of 2)

Process mining product capabilities and trends

- Process mining technology continues to evolve with a host of new and native capabilities and enhancements to help enterprises achieve greater business value
- These latest developments in process mining solutions are expected to help enterprises expand the scope of process mining, derive quick actionable insights for process enhancement, enable continuous process monitoring, and accelerate automation initiatives

Process mining provider landscape

- Celonis, Minit, Software AG, and UiPath are the top providers in terms of process mining software revenue. A few providers, such as Apromore, Monkey Mining, UiPath, and UpFlux, have achieved over 200% YoY growth
- Celonis has the largest client base, and Software AG holds the second spot in terms of number of process mining clients. Providers such as Apromore, MEHRWERK Process Mining, Monkey Mining, UiPath, and UpFlux doubled their client base YoY

Task mining market overview

- North America dominates task mining adoption globally; Continental Europe is observing significant growth with widespread adoption of task mining by early adopters of classic process mining solutions
- BFSI is the leading adopter of desktop process mining / task mining, followed by manufacturing and healthcare & pharma; professional services and manufacturing are experiencing the maximum growth rate

Outlook for 2021-22

- Increasing need for enterprises to discover, monitor, and continuously optimize business processes and greater awareness about the role of process mining in driving digital transformation at scale, is expected to accelerate process mining adoption
- With the amplified demand for a holistic automation platform, strategic partnerships with providers of complementary solutions such as RPA and process orchestration are expected to increase

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This study offers eight distinct chapters providing a deep dive into key aspects of process mining market; below are four charts to illustrate the depth of the report

Introduction to process mining

Types of process mining

1 Classic process mining

Classic process mining solutions capture process-related information from event logs generated by enterprise systems, such as ERP, CRM, and SCM, to discover and analyze as-is processes; it is primarily carried out at a macro-level.

2 Desktop process mining / task mining

Desktop process mining captures process-related information through UI logs to provide insights into the tasks and activities involved in executing a process; it is primarily carried out at a micro-level.

3 Hybrid process mining

Hybrid process mining refers to the ability to combine information from both event logs and user activities for a holistic view into as-is processes; it is carried out across both macro- and micro-levels.

Current market adoption and maturity of these technologies

Innovation introduction → Initial pilot → Early adoption

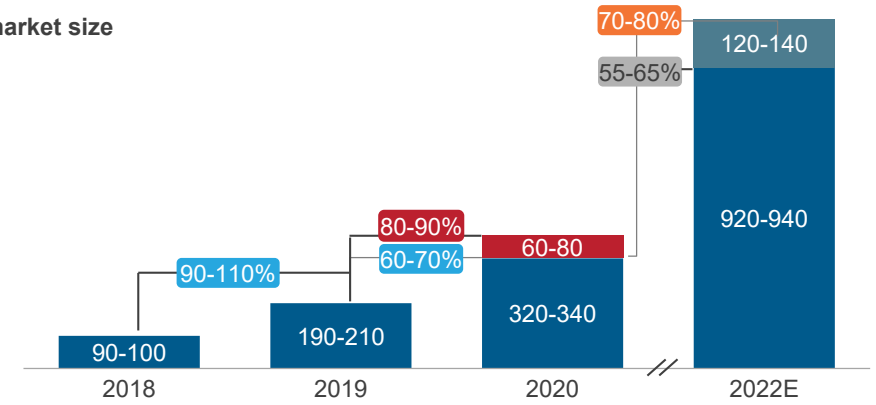
Innovation introduction → Initial pilot → Early adoption

Innovation introduction → Initial pilot → Early adoption

Process mining market overview

Process mining software market size
Revenue in US$ million

- XX Actual growth rate
- XX Expected CAGR considering the impact of COVID-19
- XX Expected CAGR without the effect of the pandemic
- Positive impact due to greater adoption after the pandemic
- Loss of revenue due to COVID-19 impact on process mining market



Process mining solution characteristics

Process mining solution characteristics

- Training & support
- Talent
- Partner ecosystem
- Deployment model & product architecture
- Commercial model

Process mining provider landscape

Providers' process mining software market share by revenue
(Providers are listed in alphabetical order within each category)

>60%	celonis
3-10%	minit, software AG, UiPath
1-2%	LANA, QPR, SIGNAVIO
<1%	apromore, EVERFLOW, integris, Live Objects, livejourney, loggpickr, MEHRWERK PROCESSMINING, MONKEY mining, myinvenio, paf now, upflux

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Research calendar

Service Optimization Technologies (SOT)

Published | Planned | Current release

Flagship SOT reports	Release date
An Evolving Digital Workforce to Assist Humans – Robotic Process Automation (RPA) State of the Market Report 2021	December 2020
Intelligent Process Automation (IPA) – Solution Provider Landscape with Solutions PEAK Matrix® Assessment 2021	March 2021
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	April 2021
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	June 2021
Intelligent Process Automation (IPA) – State of the Market Report 2021	June 2021
Process Mining – Technology Vendor Compendium 2021	July 2021
Enabling Data-based Process DNA Analysis – Process Mining State of the Market Report 2021	**August 2021**
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2021	Q3 2021

Thematic SOT reports	Release date
Accelerated Intelligent Automation (AIA) in Enterprises	May 2020
The 360-degree Enterprise Automation Playbook	May 2020
AI Start-ups Redefining Business Processes: Top 30 Trailblazers	December 2020
Understanding Cloud-native RPA	January 2021
Mine Your Journey to Digital Excellence	March 2021
Intelligent Document Processing (IDP) Playbook 2021	June 2021
Process Mining Playbook 2021	June 2021

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