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RESEARCH

Process Mining State of the Market Report 2020

Service Optimization Technologies (SOT)
State of the Market Report – June 2020: Complimentary Abstract / Table of Contents

EGR-2020-38-CA-3808

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  Global services tracking across functions, sourcing models, locations, and solution providers – industry tracking reports also available

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  - Service Optimization Technologies (SOT)
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More about membership

In addition to a suite of published research, a membership may include

- Accelerators™
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- Workshops

Custom research capabilities

- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | solution providers, locations, risk
- Other | Market intelligence, solution provider capabilities, technologies, contract assessment

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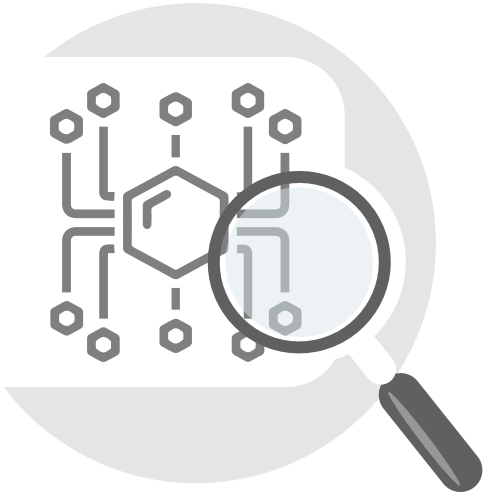
Background of the research

Everest Group defines process mining as any software product or solution to examine and analyze process-related information that is captured in event logs generated by enterprise systems such as ERP, CRM, and SCM to discover processes and generate process maps. Process mining blends the power of data-based analysis techniques, such as data mining and machine learning, to help organizations discover the as-is process along with its variants and identify process optimization/automation opportunities.

Process mining products find a wide variety of use cases in different business functions and verticals. Its adoption is expected to increase as more enterprises become aware of the benefits of the technology such as cost savings, operational efficiency through optimized processes, and enhanced employee experience through better resource allocation.

In this study, we investigate the state of the process mining technology vendor market. We focus on:



- **Introduction to process mining**
- **Process mining market size and adoption trends**
- **Buyer expectations and barriers to adoption**
- **Process mining solution characteristics**
- **Process mining vendor landscape**
- **Process mining outlook for 2020-21**

Scope of this report

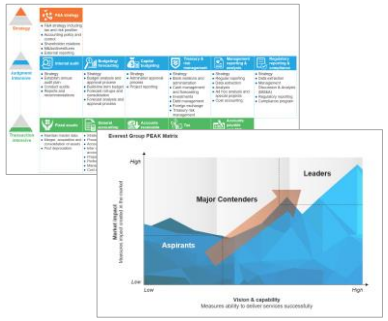
- Process mining products that are sold on license, and irrespective of any ongoing business or IT process outsourcing or managed services, were considered for this report.
- Data of process mining products from 13 leading software vendors across the globe has been leveraged for this study

Our research methodology is based on four pillars of strength to produce actionable and insightful research for the industry

- Market thought leadership
- Actionable and insightful research
- Syndicated and custom research deliverables

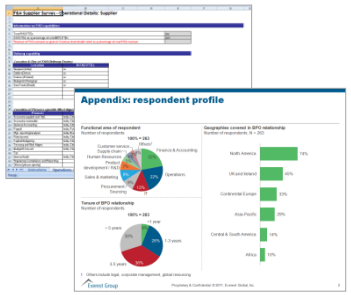
1 Robust definitions and frameworks

Function-specific pyramids, Total Value Equation, PEAK Matrix, and market maturity



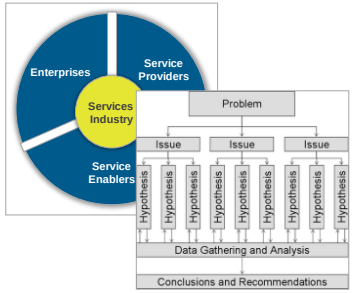
2 Primary sources of information

Annual contractual and operational RFIs, solution provider briefings and buyer interviews, and web-based surveys



3 Diverse set of market touchpoints

Ongoing interactions across key stakeholders, input from a mix of perspectives and interests, supports both data analysis and thought leadership



4 Fact-based research

Data-driven analysis with expert perspectives, trend analysis across market adoption, contracting, and solution providers

- Proprietary database on process mining capabilities of 13 broad-based product providers
- Large repository of existing research across classical and desktop process mining, along with advanced analytics
- Dedicated team for process mining research, spread over two continents
- Executive-level relationships with buyers, service providers, technology vendors, and industry associations

Everest Group's SOT research is based on multiple sources of proprietary information

Proprietary database of 13 process mining technology vendors

The database tracks the following elements for each vendor:

- Process setup, preparation, and integration
- Process discovery and intelligence
- IT governance and security
- Partnerships with service providers and other technology vendors
- Support in terms of product training, maintenance, consulting, and other support services
- Availability and adoption of commercial model(s)
- Portfolio coverage in terms of industry, geography, process areas, and buyer size
- Vendor performance in terms of revenue and clients

Demonstrations and interactions with technology vendors and other industry stakeholders

- Detailed demos and interviews with process mining technology vendors for a comprehensive view of the products
- Executive-level discussions with technology vendors as well as service providers that cover:
  - Current state of the market
  - Opportunities and challenges
  - Expected direction of movement in the industry
  - Technology vendor / service provider vision and roadmap
- Executive-level discussions with industry enablers / specialist system integrators to get the buyer perspective, and also to reaffirm the findings from other sources

On-site as well as conference meetings with enterprise process mining buyers to understand:

- Vision and objectives
- Buying criteria
- Apprehensions and challenges
- Outcomes achieved
- Future direction

Proprietary database of RPA and AI capabilities of 50+ leading technology vendors and 20+ BPS providers complements the research

The database tracks the following capability elements for each service provider:

- Clients with automation deployments, scale and scope of deployments, cost savings, and case studies
- Automation client portfolio across buyer sizes, geographies, industries, and BPS segments
- Vision and strategy, top automation solutions, their value propositions, and RPA and AI features
- Technology partnerships and collaborations with academic institutes

Process mining vendors covered

ABBYY Timeline, apromore, celonis, EVERFLOW, LANA LABS, logpickr, minit, myinvenio, paf now, PUZZLE DATA, QPR, software AG, UiPath

Scope and focus of this research

Based on the approach adopted to collect input data, process mining can be classified into two major categories

NOT EXHAUSTIVE

Primary focus of this research

Process mining landscape

1 Classic process mining

Classic process mining refers to the ability to analyze process-related information that is captured in event logs generated by enterprise systems such as ERP and CRM to discover processes and generate process maps

ABBYY Timeline, celonis, myinvenio, minit, paf now, QPR, software AG, UiPath

2 Desktop Process Mining (DPM)

DPM refers to the ability to capture user's keyboard, mouse, and potentially other system-level activities performed simultaneously on various desktops to virtually reconstruct the processes and generate process maps

ANTWORKS, celonis, edgeverve, epiance, Fortress IQ, KRYON, NICE, RPATech

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

This report is meant to provide process mining buyers, software vendors, and third-party enablers (service providers, system integrators, etc.) a detailed view of the current state of the market. As part of this, the current report provides insights into market growth, buyer adoption trends, insights from buyer satisfaction surveys, solution characteristics, and outlook for 2020-21. This report also focuses on product features and technologies that are powering process mining solutions.

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

Introduction to process mining

- Process mining solutions are software products that leverage specialized algorithms to analyze event logs generated by enterprise systems to derive meaningful process insights
- While process mining can play a key role in the success of an organization's optimization and transformation journey, the associated technologies are relatively new to many potential buyers in terms of product capabilities, features, and commercial models

Process mining market size and adoption trends

- The market grew at around 140-160% from 2018-19 to reach US$230-US$250 million with more than 85% of the revenue coming from software licenses
- Manufacturing, BFSI, and telecom industry enterprises are early adopters and together account for around 50% market share

Buyer expectations & barriers to adoption

- Enterprises are focusing on improving operational efficiency and productivity as the main objective of process mining adoption; cost savings and business impact are not being considered as major drivers, as of now
- Ease of use of the software and process discovery capabilities were cited as top strengths by customers, while analytics and interoperability were indicated as areas of improvement

Process mining solution characteristics

- Deployment on public cloud is the most common hosting option. It is offered by almost all the process mining vendors we have covered
- Process mining vendors leverage technology partners for complementary technologies such as RPA, DPM, ETL, and BPM. They are also partnering with service providers for implementation, training, and reselling to increase the reach of their products

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

Process mining technology trends

- Data captured in event logs in information systems, Extract, Transform, and Load (ETL), AI/ML models, and Business Intelligence(BI) tools are among the key technologies powering process mining capabilities
- Organization-level relationship mining for better resource allocation, reduced time and cost for creating process maps, identifying use cases for automation, and recommendations for process optimization

Process mining vendor landscape

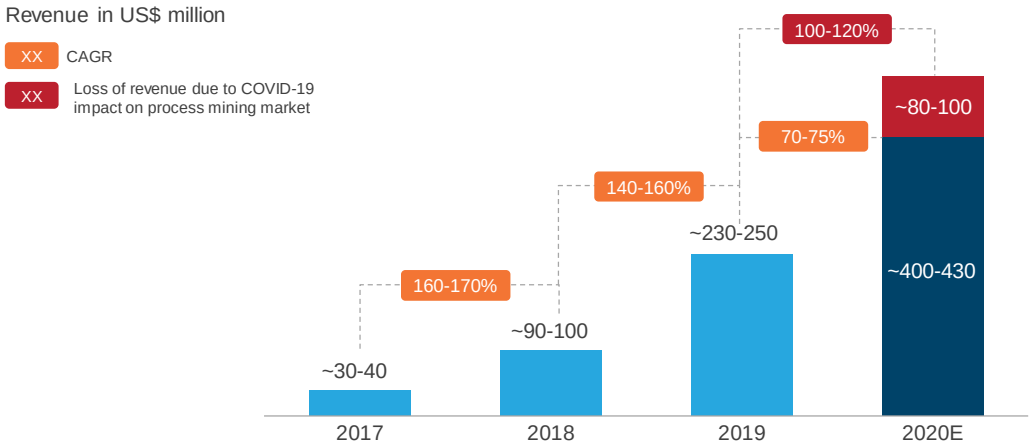
- Celonis, Software AG, and Minit are the top vendors in terms of process mining license revenue. ABBYY Timeline (formerly TimelinePI) has experienced the highest year-over-year growth in revenue
- Celonis dominates the process mining software market, accounting for over 60% market share and has the largest client base spread across small, mid-size, and large enterprise segments

Outlook for 2020-21

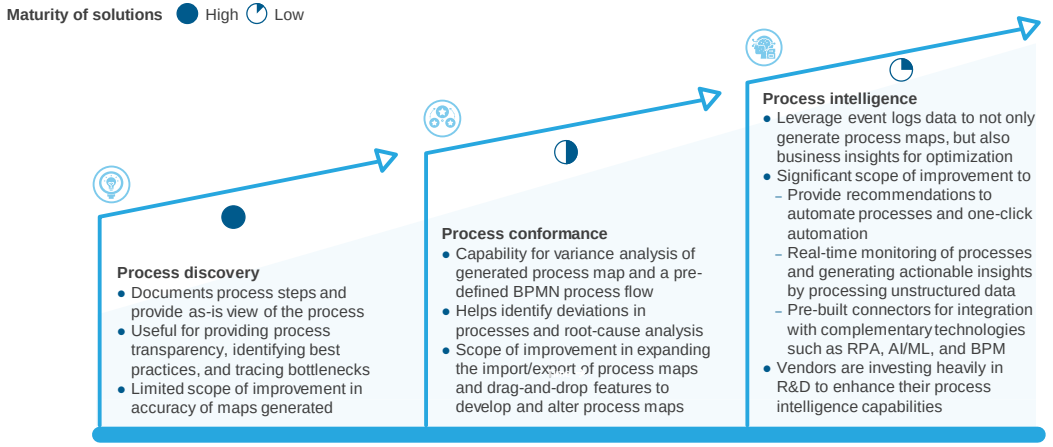
- The process mining vendor market will get adversely impacted due to COVID-19 crisis. However, it will grow rapidly as the economy recovers toward the end of 2020 and the need for process efficiency increases
- Process mining vendors will continue to invest in forging partnerships with service providers and SIs to expand their partner network. Vendors may also offer more flexible and discounted pricing to entice customers

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

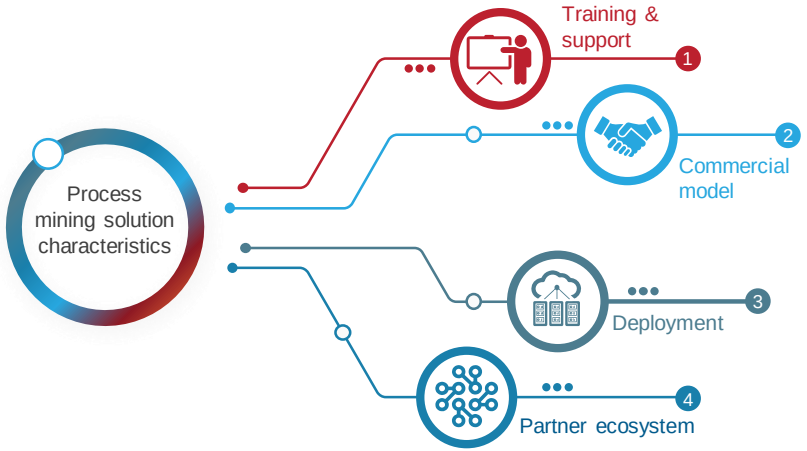
Process mining independent technology vendor market size



Advancements in process mining technology



Process mining solution characteristics



Process mining vendor landscape

(Vendors are listed in alphabetical order within each category)

>60%	celonis		
3-10%	minit		software AG
1-2%	LANA LABS	QPR	UiPath
<1%	ABBYY Timeline	apromore	EVERFLOW
	logpickr	myinvenio	paf now

Research calendar – Service Optimization Technologies (SOT)

Published | Planned | Current release

Flagship Service Optimization Technologies (SOT) reports	Release date
Enterprise IA Automation Adoption – Pinnacle Model® Analysis 2019	December 2019
Intelligent Automation in Business Processes (IABP) Solution Provider Landscape with PEAK Matrix® Assessment 2020	February 2020
Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	February 2020
IA in Business Process Services (BPS) – Solution provider compendium 2020	March 2020
Conversational AI – Technology Vendor Landscape with Products PEAK Matrix Assessment	March 2020
Intelligent Document Processing (IDP) – Technology Vendor Landscape with Products PEAK Matrix Assessment	March 2020
Process Mining – State of the Market Report 2020	**June 2020**
Robotic Process Automation (RPA) – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020	Q3 2020

Thematic Service Optimization Technologies (SOT) reports	
Intelligent automation: Accelerating from Short-term Wins to Long-term Strategic Business Outcomes	March 2019
Advanced Content Intelligence – Pivotal Technology to Empower the New Age Organization	May 2019
Who Takes on the RPA Mantle?	June 2019
Intelligent Document Processing (IDP) Playbook	September 2019
360-degree Enterprise Automation Playbook	May 2020
Intelligent Automation Orchestration	Q3 2020

Note: For a list of all of our published Service Optimization Technologies (SOT) reports, please refer to our website page

Additional Service Optimization Technologies (SOT) research references

The following documents are recommended for additional insight on the topic covered in this report. The recommended documents either provide additional details on the topic or complementary content that may be of interest

1. **Process Mining – Technology Vendor Landscape with Products PEAK Matrix® Assessment 2020** (EGR-2020-38-R-3576); 2020. While the concept of process mining has been around as a topic of academic interest, it has recently gained currency in the context of enterprise automation and digital transformation. Process mining solutions leverage event logs generated by information systems such as ERP, CRM, HCM, and SCM to reconstruct a virtual view of a business process. This report uses Everest Group's proprietary PEAK Matrix® to assess and evaluate process mining capabilities of 13 independent software vendors across two key dimensions, market impact and vision & capability. It also contains a section on assessment of Desktop Process Mining vendors

2. **Intelligent Document Processing (IDP) – State of the Market Report 2020 – Leave No Page Unturned With AI** (EGR-2020-38-R-3756); 2020. This research provides IDP buyers, software vendors, and third-party enablers (service providers, system integrators, etc.) a detailed view of the current state of the market and analyzes it across various dimensions, including market size & adoption trends, buyer satisfaction, product capabilities & trends, solution characteristics, vendor landscape, challenges to IDP adoption, and outlook for 2020-21

3. **Process Mining – Technology Vendor Profile Compendium 2020** (EGR-2020-38-R-3689); 2020. This report provides key stakeholders a snapshot of 13 leading process mining technology vendors' offerings and capabilities. It also allows technology vendors to compare their offerings, capabilities, and areas of strength and improvement with other vendors in the marketplace

For more information on this and other research published by Everest Group, please contact us:

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Everest Group®

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