

# Process Orchestration – Technology Provider Landscape with Products PEAK Matrix® Assessment 2023

November 2022: Complimentary Abstract / Table of Contents



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## Background of the research

Everest Group defines Process Orchestration (PO) as software that helps enterprise users design, manage, and monitor end-to-end business processes. It includes key capabilities such as process modeling, business rules management, the ability to design user interfaces for capturing/presenting data, hybrid (human + digital) workforce management, and the ability to provide process-related insights. It should be able to orchestrate the flow of work across human workers, digital workers (such as RPA, IDP, and conversational AI), and enterprise applications in long-running workflows.

For the scope of this study, we cover products in the market that are low-code/no-code and broad-based business process-centric products (not focused on a particular use case / function / industry) and are available for independent licensing. The product should also be capable of handling workflows that may not involve digital workers.

In this research, we present an assessment of 18 technology providers featured on the process orchestration products PEAK Matrix®. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading technology providers, client reference checks, and ongoing analysis of the process orchestration software market.

### In this study, we analyze the process orchestration technology landscape across various dimensions:

- Everest Group's PEAK Matrix® evaluation, a comparative assessment of 18 leading process orchestration technology providers
- Competitive landscape in the process orchestration technology provider market
- Key process orchestration technology trends
- Remarks on key strengths and limitations for each process orchestration technology provider

#### Scope of this report



**Geography**  
Global



**Providers**  
18 leading process  
orchestration technology  
providers



**Product**  
Process orchestration

## This report is based on two key sources of proprietary information

### Proprietary database of 18 process orchestration technology providers

- The database tracks the following elements of each contract:
  - Process design and business rules management
  - Low-code/No-code user interface, hybrid workforce management
  - Monitoring & analytics, interoperability
  - Partnerships with service providers and other technology providers
  - Deployment and hosting options
  - Product-related training and support services
  - Availability and adoption of commercial model(s)
  - IT governance and security

### Proprietary operational information database of technology providers (updated annually)

- The database tracks the following for each provider:
  - Revenue and number of FTEs
  - Number of clients
  - FTE split by different lines of business
  - Portfolio coverage in terms of industry, geography, process areas, and buyer size

### Demonstrations and interactions with technology providers and other industry stakeholders

- Detailed demonstrations for a comprehensive product view and executive-level discussions with process orchestration providers that cover:
  - Current state of the market
  - Vision and strategy
  - Opportunities and challenges
  - Emerging areas of investment
  - Annual performance and future outlook

### Buyer reference interviews, ongoing buyer surveys, and interactions

- Interviews with technology providers' reference clients and enterprise process orchestration buyers to get the buyer perspective around:
  - Drivers and objectives for adopting process orchestration
  - Apprehensions and challenges
  - Assessment of providers' performance
  - Emerging priorities / buying criteria
  - Outcomes achieved
  - Lessons learned and best practices adopted

### Providers assessed<sup>1</sup>



<sup>1</sup> Assessment for Bonitasoft, Microsoft, and Pega excludes detailed provider inputs for this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these technology providers, their public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may not be complete  
**The source of all content is Everest Group unless otherwise specified**

Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion

## Overview and abbreviated summary of key messages

Enterprise process orchestration is a software that helps design, execute, and monitor end-to-end business processes. This report leverages Everest Group's proprietary PEAK Matrix® to assess and evaluate process orchestration capabilities of independent software providers across two key dimensions, market impact and vision & capability. It also includes competitive landscape, Everest Group's remarks on technology providers highlighting their key strengths & limitations, and insights into process orchestration technology trends.

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

### Everest Group Process Orchestration Products PEAK Matrix® 2023

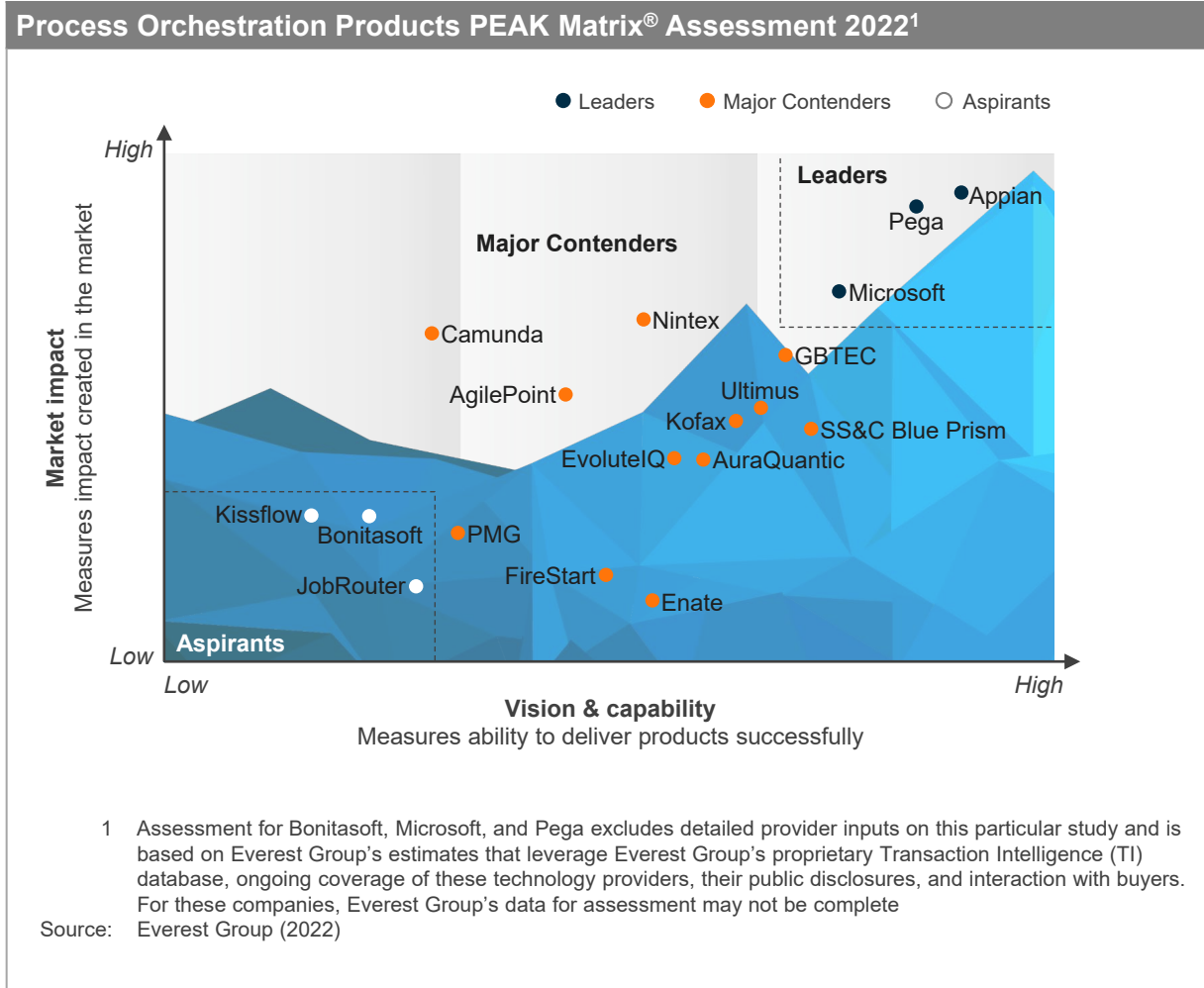
- Everest Group classifies process orchestration technology providers on the Everest Group Products PEAK Matrix® into the three categories of Leaders, Major Contenders, and Aspirants:
  - **Leaders:** Appian, Microsoft, and Pega
  - **Major Contenders:** AgilePoint, AuraQuantic, Camunda, Enate, EvoluteIQ, FireStart, GBTEC, Kofax, Nintex, PMG, SS&C Blue Prism, and Ultimus
  - **Aspirants:** Bonitasoft, JobRouter, and Kissflow
- Appian, Nintex, and Pega are the top providers in terms of process orchestration software revenue, closely followed by Kofax and Microsoft

### Insights on competitive landscape

- Appian, Nintex, and Pega are the top providers in terms of process orchestration license revenue. EvoluteIQ, Camunda, FireStart, and Kissflow have experienced more than 40% YoY growth in the market
- AgilePoint, Microsoft, and Nintex are the leaders in terms of the number of process orchestration clients. EvoluteIQ, Enate, and Kissflow have achieved over 50% YoY growth in the number of clients
- Appian and Nintex are among the leading providers across all the key verticals, while Microsoft and Pega are the other providers with high market share across industries
- North America has the highest process orchestration adoption, followed by Continental Europe. Appian and Pega have a strong presence across all geographies. Nintex and Microsoft are other dominant providers across major geographies
- Pega has the highest share of the revenue from clients across large and midsize buyer segments. Nintex has the largest share across other enterprise buyer segments such as small buyers and SMBs



# This study offers five distinct chapters providing a deep dive into key aspects of process orchestration technology provider market; below are three charts to illustrate the depth of the report



### Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision & capability					
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
Provider 1	●	○	●	●	●	○	●	○	○	○
Provider 2	○	○	○	○	○	○	●	○	○	○
Provider 3	○	●	●	●	●	○	○	○	○	○
Provider 4	○	○	○	○	●	○	○	○	○	○
Provider 5	●	○	○	○	○	○	○	○	○	○
Provider 6	○	○	○	○	○	○	○	○	○	○
Provider 7	○	○	○	○	○	○	●	○	○	○
Provider 8	○	○	○	○	○	○	○	○	○	○
Provider 9	○	○	○	○	○	○	○	○	○	○

### Everest Group’s remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Process design and management	Hybrid workforce management	Implementation and support	Commercial model	Overall
○	○	○	○	○	○	○	○	○	○

**Strengths**

- Provider offers process orchestration capabilities for automating workflows and managing the hybrid workforce. Its platform is responsible for process design and has an interface targeted at citizen and professional developers
- Clients appreciate the ease of use of the platform, the product roadmap, and the product support. They find the products cost of ownership as reasonable. Clients also appreciate the ability to migrate running applications to new versions

**Limitations**

- The client portfolio of the provider is skewed toward small enterprise and SMB segments with revenue less than US\$1 billion. It has relatively lower experience of serving clients in mid-size and large enterprise segments
- The majority of provider’s clientele is from North America and Continental Europe. Its presence in other geographies such as the UK is relatively low while it lacks presence in LATAM

# Research calendar

## Service Optimization Technologies (SOT)

Published Planned Current release

Reports title	Release date
Stepping into the Era of Digital Workers – Robotic Process Automation (RPA) State of the Market Report 2022	December 2021
Defining Attended RPA – What to Look for in an Enterprise-grade Attended RPA Solution?	March 2021
Intelligent Process Automation (IPA) – Solution Provider Landscape with PEAK Matrix® Assessment 2022	March 2021
Intelligent Document Processing (IDP) – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	May 2021
Process Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	June 2021
The Business Case for Process Mining – From Evaluation to Value Realization	June 2021
A New Era of Business Process Innovation – Intelligent Processes Automation (IPA) State of the Market Report 2022	June 2021
Intelligent Document Processing (IDP) – State of the Market Report 2022	July 2022
Task Mining – Technology Provider Landscape with Products PEAK Matrix® Assessment 2022	August 2022
Wear an Analytical Lens to Optimize Processes – Process Mining State of the Market Report 2022	September 2022
Task Mining – State of the Market Report 2023	October 2022
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2023	October 2022
<b>Process Orchestration – Technology Provider Landscape with PEAK Matrix® Assessment 2023</b>	<b>November 2022</b>
Process Orchestration – Technology Provider Compendium 2023	Q4 2022
Robotic Process Automation (RPA) – State of the Market Report 2023	Q4 2022

Note: [Click](#) to see a list of all of our published Service Optimization Technologies (SOT) reports



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