

# Process Orchestration State of the Market 2023 – Update

December 2023: Complimentary Abstract / Table of Contents



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## Introduction

Everest Group defines Process Orchestration (PO) as software that helps business 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 study, we investigate the state of the process orchestration market and focus on:**

- Overview of process orchestration
- Market size and adoption trends across buyer geography, industry, and business function
- Buyer expectations including key barriers to adoption and best practices
- Process orchestration solution characteristics and key product capabilities and trends
- Process orchestration provider landscape
- Outlook for 2024

### Scope of this report



**Geography**  
Global



**Providers**  
24 leading process  
orchestration technology  
providers



**Product**  
Process orchestration

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

This report provides process orchestration buyers, software providers, and third-party enablers (service providers, system integrators, etc.) a detailed overview of the process orchestration software and analyzes the process orchestration market across various dimensions including market size and adoption trends, buyer expectations including key barriers to adoption and best practices, solution characteristics, product capabilities and trends, technology provider landscape, and outlook for 2024

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

### Overview of process orchestration

- Process orchestration software provides capabilities for the design and management of end-to-end processes along with process and workforce 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
- Enterprises adopt process orchestration solutions for several applications including process standardization, workflow automation, and process optimization

### Market size and adoption trends

- The process orchestration software market stood at ~US\$2.8 billion in 2022, experiencing a YoY growth of over 17%
- While North America continues to be the leading adopter of process orchestration solutions, other geographies such as APAC and Continental Europe recorded a strong growth rate
- BFSI and healthcare and pharma industries continue to be the leading adopters of process orchestration solutions; CPG and retail experienced the highest YoY growth

### Buyer expectations

- Buyers have indicated a high level of satisfaction with providers on their overall performance, though there exists scope to be more proactive in the communication and execution of the product roadmap
- Lack of overall as-is process visibility, internal resistance, lack of stakeholder alignment, measuring RoI, and inadequate technology awareness are the main barriers to the adoption of process orchestration solutions

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

### Process orchestration solution characteristics

- Process orchestration providers are directing their investments into creating a balanced mix of training modes, with increased focus on online training programs
- North America and APAC together account for over 65% of the total process orchestration FTEs, indicating a strong talent pool in these regions
- Process orchestration providers leverage technology partners to enhance access to complementary capabilities and service providers for reselling, training, and implementing their products

### Process orchestration provider landscape

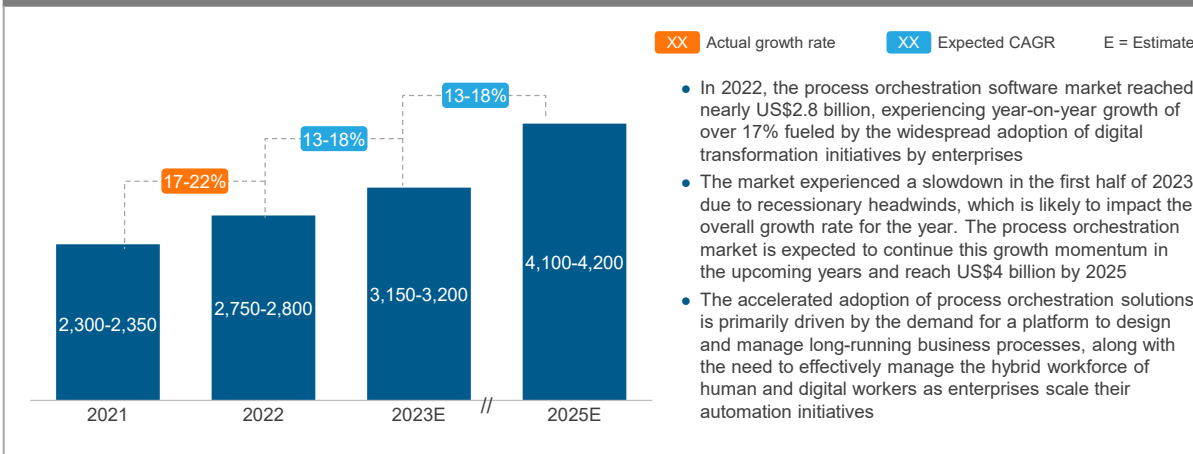
- Appian, Microsoft, Nintex, and Pega are the top providers in terms of process orchestration software revenue
- Appian and SS&C Blue Prism are among the leading providers across all the key verticals. Microsoft and Pega are the other providers with high market share across industries
- Appian and Pega have a strong presence across all geographies. Nintex and SS&C Blue Prism are the other dominant providers across major geographies

### Outlook for 2024

- There is increasing emphasis on forming partnerships or in-house development of capabilities for complementary technologies such as RPA, IDP, process mining, and conversational AI, signaling a trend towards a unified IAP capable of orchestrating processes involving unstructured data, repetitive manual tasks, and dynamic customer interactions
- Process orchestration providers continue to invest in low-code/no-code UI capabilities, empowering citizen developers to build responsive forms and process-centric applications
- Process orchestration providers are actively investing in seamlessly integrating generative AI into their products. This facilitates capabilities such as natural language-driven workflow generation, test data generation, advanced agent-assist, and predictive analytics
- Process orchestration providers are expected to further increase their focus on evangelizing the technology through various events, workshops, and thought leadership initiatives to create awareness and share best practices with enterprises

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

## Process orchestration software market size and adoption trends



## Buyer expectations

**Key factors driving process orchestration adoption**  
Importance on a scale of 1 to 7

Factor	2023 Importance	Subdimensions	Relevance of the driver for clients (2023)	Provider performance
Cost impact	6.2	Generate cost savings	6.2	5.8
		Improving process governance and compliance	6.5	6.2
Operational impact	6.3	Improving employee/workforce productivity	6.5	6.2
		Monitoring and optimizing processes	5.9	5.9
		Improving the Rol of transformation initiatives	6.4	6.1
Strategic impact	6.0	Enhancing customer experience	6.0	6.1
		Increasing top-line growth	5.6	5.7

## Process orchestration solution characteristics



## Process orchestration provider landscape

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

Market Share	Providers
>5%	appian, KOFAX, Microsoft, nintex, PEGA
1-5%	aura quantic, ORACLE, SAP, SS&C   blueprism, ULTIMUS
0.5-1%	agilepoint, AXONIVY, DECISIONS, evoluteiq, G3, kissflow, salesforce, Zoho
<0.5%	AUTOMATION ANYWHERE, enate, FireStart, niividous, pmg, ZVOLV



# Research calendar

## Service Optimization Technologies (SOT)

Published Planned Current release

Reports title	Release date
Unlocking the Power of Hybrid Workforce – Process Orchestration State of the Market 2023	February 2023
Intelligent Automation – How Much is Your Dollar Worth?	March 2023
Intelligent Process Automation (IPA) PEAK Matrix® Assessment 2023	April 2023
Process Mining Products PEAK Matrix® Assessment 2023	June 2023
Continuous Process Improvement in Action – Process Mining State of the Market 2023	July 2023
Task Mining Products PEAK Matrix® Assessment 2023	August 2023
Task Mining – Technology Provider Compendium 2023	September 2023
Task Mining – State of the Market 2023	September 2023
Conversational AI Products PEAK Matrix® Assessment 2023	September 2023
Robotic Process Automation (RPA) – Technology Provider Landscape with PEAK Matrix® Assessment 2023	October 2023
Process Orchestration Products PEAK Matrix® Assessment 2023 – Update	November 2023
Robotic Process Automation (RPA) – Technology Provider Compendium 2023	December 2023
Process Orchestration Products – Provider Compendium 2023 – Update	December 2023
<b>Process Orchestration State of the Market 2023 – Update</b>	<b>December 2023</b>
Robotic Process Automation (RPA) State of the Market 2023 – Update	Q4 2023

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