



Process Orchestration Products PEAK Matrix[®] Assessment 2024

November 2024: Complimentary Abstract / Table of Contents



Service Optimization Technologies



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- ▶ Network Services and 5G
- ▶ Oracle Services
- ▶ Outsourcing Excellence
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- ▶ Payer and Provider Information Technology
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- ▶ Pricing Analytics as a Service
- ▶ Process Intelligence
- ▶ Process Orchestration
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- ▶ Revenue Cycle Management
- ▶ Rewards and Recognition
- ▶ SAP Services
- ▶ Service Optimization Technologies
- ▶ Software Product Engineering Services
- ▶ Supply Chain Management (SCM) Services
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Introduction

Everest Group defines process orchestration 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, ability to design user interfaces for capturing/presenting data, hybrid (human+digital) workforce management, and 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.

In this study, we assess process orchestration technology 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), should help business users design, manage, and monitor business processes, and are available for independent licensing. The product should also be capable of handling workflows that may not involve digital workers.

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

- Overview of process orchestration
- Everest Group's PEAK Matrix® evaluation, a comparative assessment of 24 leading process orchestration technology providers
- Competitive landscape of the process orchestration technology provider market
- Key process orchestration technology trends
- Remarks on the key strengths and limitations of each process orchestration technology provider

This report includes the profiles of the following 24 leading technology providers featured on the process orchestration PEAK Matrix®:

- Leaders: Appian, GBTEC, Microsoft, Pega, SS&C Blue Prism, and Tungsten Automation
- Major Contenders: AuraQuantic, Axon Ivy, Celonis, Decisions, Enate, EvoluteIQ, Genpact, Nintex, Nividous, Oracle, Pipefy, ServiceNow, UiPath, Zoho, and Zvolv
- Aspirants: Bonitasoft, Kissflow, and UST

Scope of this report

Geography: global

Industry: Process orchestration

Overview and abbreviated summary of key messages

This report examines the process orchestration technology market and evaluates the positioning of technology providers on the Everest Group PEAK Matrix®. It provides insights into the evolving competitive landscape, technology trends, providers' capabilities, and Everest Group's remarks on providers' key strengths and limitations.

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

The process orchestration market competitive landscape

- Appian, Microsoft, Nintex, and Pega are the top providers in terms of software revenue; Celonis, EvoluteIQ, and Genpact achieved strong YoY growth
- Microsoft, Nintex, Pega, and Pipefy are the top providers by process orchestration clients; EvoluteIQ, Genpact, and Zvolv achieved high YoY growth in their client base
- Pega is the dominant provider across multiple industries, while Appian and Microsoft take other top spots across industries
- Pega leads in market share across most markets except MEA, which is led by Appian
- Pega has the highest market share across mega and large buyer segments, while Microsoft takes the top spot in midsize buyer segment

Technology provider characteristics

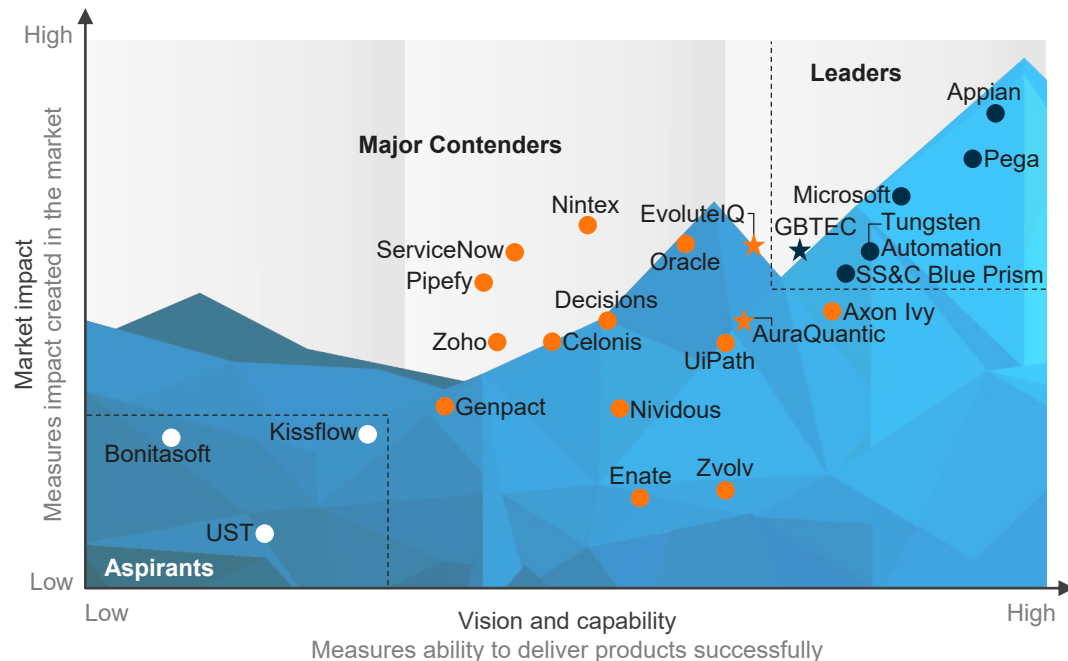
- Appian, GBTEC, Microsoft, Pega, SS&C Blue Prism, and Tungsten Automation are the current leaders in the process orchestration technology providers market, with several other providers emerging as major contenders and aspirants
- Leaders are consolidating their position in the market with the addition of advanced capabilities and expansion in major geographies and buyer segments. They are also looking toward enhanced integrations with complementary technologies
- A few major contenders have displayed significant movements toward leaders by investing in generative AI capabilities such as building workflows, forms, and applications using natural language prompts
- Aspirants are investing in developing key process orchestration capabilities, but they can look toward developing more advanced features, especially around generative AI and integration with complementary technologies

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

Everest Group PEAK Matrix® Assessment 2024

Everest Group Process Orchestration Products PEAK Matrix® Assessment 2024

● Leaders ● Major Contenders ○ Aspirants ☆ Star Performers



1 Assessment for Microsoft, Oracle, Pega, ServiceNow, and Zoho excludes detailed provider inputs on this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary 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
 Note: Star Performers are selected based on a relative comparison of providers' performance on the market impact and vision & capability dimensions in the previous and latest PEAK Matrix® assessments. Providers with the highest year-over-year improvement are designated as Star Performers. The Star Performer title does not reflect the overall market leadership position, which is designated through Leaders, Major Contenders, or Aspirants
 Source: Everest Group (2024)

Capability assessment

Illustrative example

Measure of capability: ○ Low ● High

Providers	Market impact				Vision and 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	○	○	●	○	●	○	○	○	○	○

Everest Group's remarks on providers

Illustrative example

Measure of capability: ○ Low ● High

Market impact				Vision and 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 1 aims to deliver comprehensive process automation and orchestration through its unified low-code platform. Its continued investments in generative AI, AI skill designer, and underscores its commitment toward innovation
- Provider 1 enables users to edit, test, and monitor process execution instances. It also includes a process debugging feature to ensure error-free workflows and simulation analysis

Limitations

- Provider 1 does not support a linear programming model, which would assist enterprises in designing business rules for complex use cases such as production planning, inventory management, and supply chain optimization
- Provider 1 does not offer a conversational interface to customize pre-built workflows using natural language prompts

Research calendar

Service Optimization Technologies (SOT)

	Published	Current release	Planned
Reports title	Release date		
Process Orchestration Products – Provider Compendium 2023 – Update			December 2023
Process Orchestration State of the Market 2023 – Update			December 2023
Robotic Process Automation (RPA) State of the Market 2023 – Update			December 2023
Intelligent Document Processing (IDP), Banking IDP, and Insurance IDP Products PEAK Matrix® Assessments 2024			March 2024
Intelligent Process Automation (IPA) Solutions PEAK Matrix® Assessment 2024			April 2024
Intelligent Document Processing (IDP) – Provider Compendium 2024			May 2024
Intelligent Document Processing (IDP) State of the Market 2024			June 2024
Process Mining Products PEAK Matrix® Assessment 2024			June 2024
Process Mining – Provider Compendium 2024			July 2024
Digital Interaction Intelligence Products PEAK Matrix® Assessment 2024			August 2024
Process Mining State of the Market 2024			August 2024
Process Orchestration Products PEAK Matrix® Assessment 2024			November 2024
Digital Interaction Intelligence (DII) State of the Market 2024			Q4 2024
Process Orchestration – Provider Compendium 2024			Q4 2024

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