Everest Group®

Everest Group Process Orchestration Products PEAK Matrix® Assessment 2025

Focus on EvoluteIQ

November 2025

PEAK MATRIX®

Copyright © 2025 Everest Global, Inc. | this document has been licensed to **EvoluteIQ**

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, the ability to design user interfaces for capturing/presenting data, hybrid (human+digital) workforce management, and the ability to provide process-related insights.

Process orchestration software helps business users design, manage, and monitor business processes and orchestrates the flow of work across human workers, digital workers, and enterprise applications in long-running workflows. These capabilities are available independently of professional services. Considering the emergence of agentic AI, this evaluation also includes process orchestration products' agentic orchestration capabilities.

In the report, Everest Group presents a comprehensive assessment of process orchestration technology providers' capabilities, vision, and market impact and categorizes them as Leaders, Major Contenders, and Aspirants on Everest Group's PEAK Matrix® framework. This research will help buyers select the right-fit process orchestration technology providers for their needs, while technology providers will be able to benchmark themselves against peers.

The full report includes the profiles of the following 28 leading process orchestration providers featured on the Process Orchestration Products PEAK Matrix® Assessment 2025:

- **Leaders:** Appian, Camunda, EvoluteIQ, GBTEC, Microsoft, Pega, SS&C Blue Prism, and Tungsten Automation
- **Major Contenders:** Axon Ivy, AuraQuantic, Celonis, Decisions, Enate, Genpact, Kissflow, Metiz, Neutrinos, Nintex, Nividous, Orkes, ProcessMaker, SAP, ServiceNow, UiPath, and Zvolv
- **Aspirants:** HCLSoftware, PMG, and UST

Scope of this report

Geography: global

Product: process orchestration

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvoluteIQ**

Scope of the evaluation

The underlying components enable four key capabilities – process design and execution, business rules and decision management, low-/no-code UI development, and hybrid workforce management

Focus of research

Process design and execution

This provides users the ability to design business processes, document process maps, and execute processes. It also allows users to define scenarios and run process simulations to aid with business decisions.

Business rules and decision management

This enables users to configure and execute business rules within the process and discover the existing business rules in business processes.

Low-/No-code user interface development

This allows users to create static as well as dynamic forms and create process-centric applications to automate workflows. The form builder also has a centralized repository of standard reusable form templates for common use cases.

Hybrid workforce management

This helps in assigning tasks to resources, handling any kind of exceptions, and optimizing the workload between human and digital workforce. Users can configure alerts and notifications for any exceptions.

Scope boundaries

Included in scope

- Core capabilities including process design and execution, business rules and decision management, low-code/no-code user interface development, hybrid (human + digital) workforce management, and process insights
- Ability to orchestrate work across humans, digital workers (RPA, IDP, AI agents, conversational AI), and enterprise apps in long-running workflows
- Low-/No-code, broad-based, business process-centric solutions available for independent licensing; capable of handling workflows without digital workers
- Generative AI, custom AI, and agentic AI enhancements and innovation across the core capabilities
- Evaluation also considers agentic orchestration capabilities, though these are optional and do not affect qualification

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

Process Orchestration Products PEAK Matrix® characteristics

Leaders

Appian, Camunda, EvoluteIQ, GBTEC, Microsoft, Pega, SS&C Blue Prism, and Tungsten Automation

- Leaders are strengthening their process orchestration capabilities and are moving toward maturing generative AI-based capabilities into the platform. They have incorporated natural language-based capabilities across the orchestration layers, such as generative process design, forms and applications, and reports using prompts
- Leaders are pioneering the agentic process orchestration capabilities with significant investments in pre-built AI agents, agent studio, communication protocols such as MCP, and partnerships with service and technology providers
- They have maintained their position in the market with the sustained acquisition of clients across geographies and industries. Their growth has slowed down marginally over the last year, given uncertain macroeconomic conditions and cautious investments from enterprises

Major Contenders

Axon Ivy, AuraQuantic, Celonis, Decisions, Enate, Genpact, Kissflow, Metiz, Neutrinos, Nintex, Nividous, Orkes, ProcessMaker, SAP, ServiceNow, UiPath, and Zvolv

- Major Contenders are rapidly developing their platform capabilities while also investing in the development and innovation of agentic AI. They are in the process of deploying generative AI-based capabilities across the product. They are expanding their portfolio of pre-packaged solutions
- They are expanding their presence across geographies, especially in high-growth markets such as MEA and APAC. They are also expanding their partnerships with cloud and AI providers
- Major Contenders are simultaneously working on development of an end-to-end automation platform by integrating complementary technologies such as process intelligence, IDP, and RPA

Aspirants

HCLSoftware, PMG, and UST

- Aspirants are focusing on developing and integrating their capabilities across process design, hybrid workforce management, and forms and application builder to offer end-to-end process orchestration
- They are also investing in generative AI and agentic AI capabilities with phased integration with the process orchestration product
- They are expanding their partnership ecosystem, partnering with other technology providers for complementary technologies such as RPA, IDP, and process intelligence

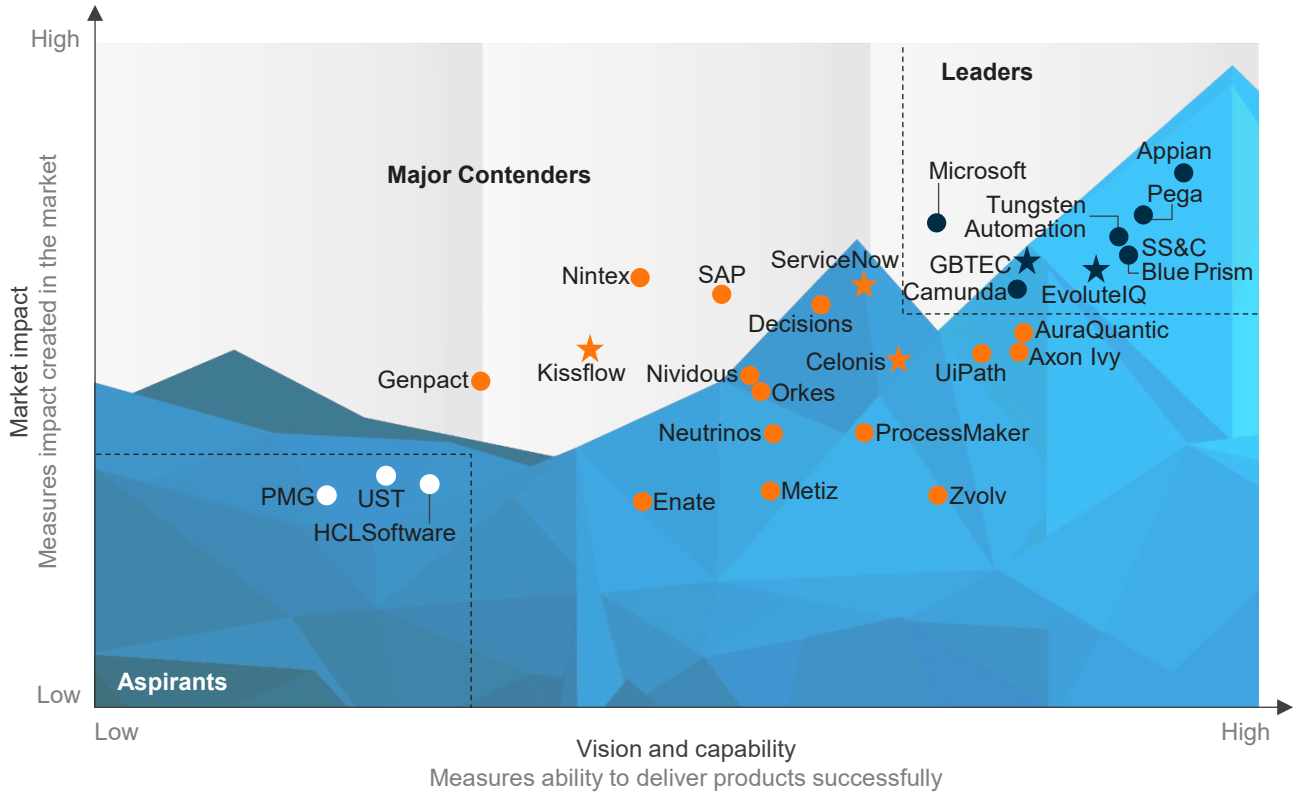
Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvoluteIQ**

Everest Group PEAK Matrix®

Process Orchestration PEAK Matrix® Assessment 2025 | EvoluteIQ is positioned as a Leader and a Star Performer

Everest Group Process Orchestration PEAK Matrix® Assessment 2025[1]

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



1 Assessments of Microsoft and PMG exclude provider inputs. Assessments of Axon Ivy, Camunda, Pega, SAP, and ServiceNow are based on partial inputs from the providers
Source: Everest Group (2025)

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvoluteIQ**

EvoluteIQ (page 1 of 2)

Everest Group assessment – Leader and Star Performer

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

- EvoluteIQ's vision is to scale AI-driven automation for enterprise transformation through an AI-native platform that unifies agentic and generative AI, IDP, and low-code orchestration
- It provides a drag-and-drop modeler for workflow designing, along with real-time syntax correction. It enables simulation with AI-suggested scenarios and generation of training manuals, helping enterprises validate process models and prepare for variance conditions
- The platform offers features to build a flow for data at rest via DataFlows and for data-in-motion via EventFlows, enhancing the management of static and dynamic data processes
- It supports different rule models, including logical expressions, decision tables, decision trees, and linear programming for optimization use cases. It also offers the ability to automate the detection of gaps in rule sets and generate the missing rules
- It supports custom rule authoring through multiple standards (DMN, FEEL, DRL, Java, JavaScript, etc.) and a low-code ML Studio for predictive rule creation
- It offers a drag-and-drop form and application builder, supported by pre-built modules for common use cases. These are integrated with a centralized Data Fabric, allowing input/output connectivity and efficiency in application development
- The GenIQ module leverages generative AI to enable workflow design along with form and application development through natural language. It also strengthens business rules management by supporting natural language design, gap detection, and auto-generation of missing rules
- The platform includes a real-time communication layer and integrations with MS Teams, Zoom, and Jitsi, enabling dynamic visibility into digital and human workforce operations
- EvoluteIQ's Agentic Mesh Architecture (aMa) coordinates multiple AI agents in a decentralized network, enabling autonomous execution, contextual replanning, and human-in-the-loop interventions. The AI Workbench allows enterprises to design, orchestrate, and monitor both built-in and third-party agents
- It provides real-time dashboards to monitor KPIs, SLAs, and workforce utilization. It also enables users to build advanced operational analytics using DataFlows and EventFlows
- EvoluteIQ provides pre-built integrations with enterprise applications, databases, BI tools, LLMs, and business rules engines, supporting both API-based and RPA-based connectivity
- Buyers appreciate the platform's integration and orchestration across diverse technology environments, low-/no-code capabilities, and a simple and scalable licensing model

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvoluteIQ**

EvoluteIQ (page 2 of 2)

Everest Group assessment – Leader and Star Performer

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

Limitations

- EvoluteIQ's revenue base is skewed toward North America and the UK geographic regions. There is scope for it to expand to other regions, such as Continental Europe, APAC, LATAM, and MEA
- While it serves multiple industries and process areas, it has relatively limited experience in serving clients in CPG and retail, healthcare and pharma, procurement, and Information Technology Service Management (ITSM)
- The platform does not provide a native pre-built library of business rules, relying instead on domain-specific contributions via partners. It also currently does not offer the ability to monitor rule performance and conduct root-cause analysis
- It does not currently offer Large Action Models (LAMs) to predict next-best actions or action sequences, which limits advanced decision intelligence and proactive process guidance. However, this capability is included in the product roadmap
- There is scope for EvoluteIQ to enhance the value proposition of its platform by offering a dashboard for operational visibility of AI agents, which limits enterprises' ability to monitor agent activity, troubleshoot issues, and ensure governance in real time
- EvoluteIQ does not currently offer a free community version of the product, an online user community, or a support forum. However, they are in the roadmap
- Buyers highlighted the need for additional domain-specific accelerators and point solutions, particularly in areas such as healthcare RCM. They also suggested greater clarity in naming conventions, continued innovation in agentic AI capabilities, and more configurable UI options

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvoluteIQ**

Market trends

The process orchestration market is experiencing a shift from traditional workflow automation toward AI-enabled and agentic orchestration models

Market size and growth

- The process orchestration market is around US$3.5 billion and is expected to expand at a growth rate of 12-16%
- As the market matures and growth rates stabilize, process orchestration is evolving from workflow automation to agentic orchestration, where AI-driven agents autonomously plan, execute, and adapt workflows in real time. This shift is expanding its role from operational efficiency to enabling adaptive, intelligence-led enterprise transformation

Key drivers for process orchestration

Improving operational efficiency	Process orchestration eliminates manual dependencies, streamlines workflows, and enhances visibility across functions, resulting in faster cycle times and improved productivity.
Improving process governance and compliance	By standardizing workflows and embedding rule-based controls, it strengthens compliance oversight and reduces risks of policy or regulatory violations.
Enabling digital transformation	As a core enabler of enterprise automation, process orchestration connects siloed systems and technologies to deliver unified, data-driven digital operations.
Generating cost savings	Automation of repetitive tasks and improved resource utilization through orchestration translate into measurable cost reduction and higher return on process investments.

Key challenges to process orchestration adoption

Integration complexity with legacy systems	Enterprises face challenges integrating process orchestration with fragmented and legacy IT systems, often resulting in extended deployment timelines and higher configuration efforts.
Compliance and data security concerns	Growing use of AI within orchestration raises concerns around regulatory compliance, data privacy, and governance, slowing enterprise adoption.
Lack of stakeholder alignment	Misalignment between business and IT teams on ownership and priorities limits the effectiveness of orchestration initiatives and delays scaling efforts.
Measuring RoI and value realization	Difficulty in defining and tracking success metrics makes it challenging to demonstrate tangible RoI, leading to slower executive buy-in and budget approvals.

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

Provider landscape analysis

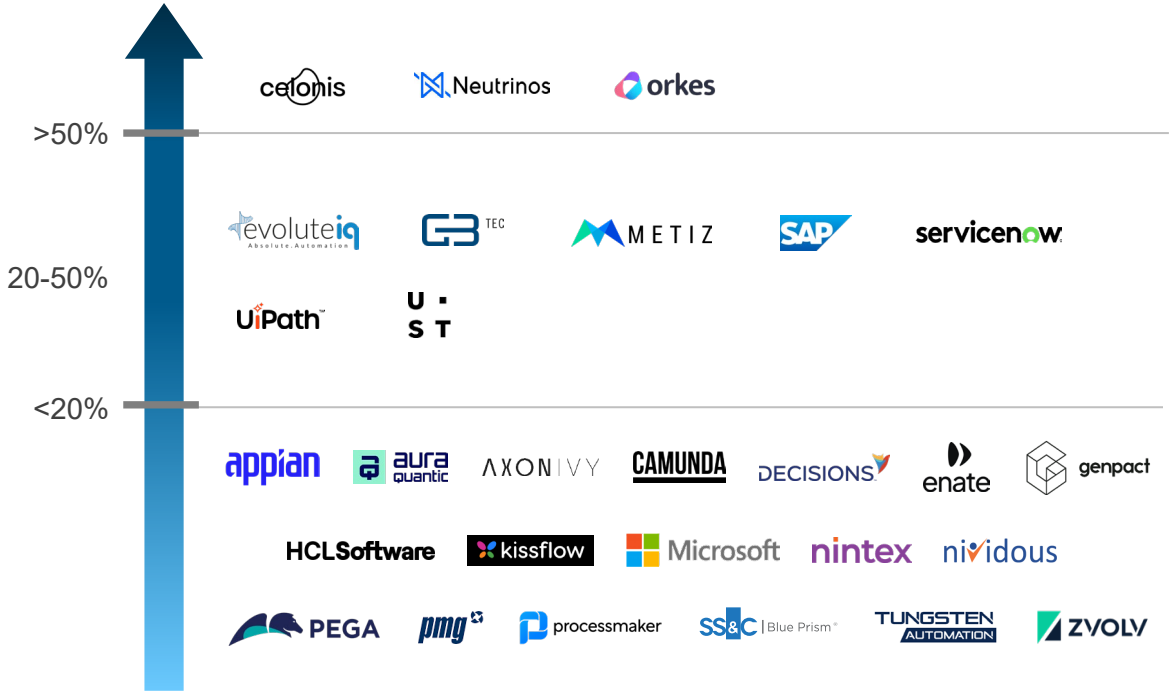
Appian, Microsoft, Pega, and Tungsten Automation are the top providers in terms of software revenue; Celonis, Neutrinos, and Orkes achieved strong YoY growth

Market share analysis of the providers[1]

2024; percentage of the overall process orchestration market

Provider market share by YoY growth[1]

2023-24; increase in percentage of revenue



1 Providers are listed alphabetically within each range

Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

Key buyer considerations

Key platform evaluation criteria include ease of use, product cost, AI capabilities, scalability, and customer orientation and flexibility

Key sourcing criteria

High

Priority

Medium

Ease of use

Enterprises seek intuitive, no-code design environments that enable both business and IT users to create and modify workflows easily, reducing dependence on technical resources.

Product cost

Buyers continue to emphasize the total cost of ownership, prioritizing platforms with transparent licensing, low overhead costs, and faster time-to-value.

AI capabilities

As generative and predictive AI matures, buyers increasingly prefer orchestration platforms that embed AI to recommend process optimizations, automate decisions, and enhance process designing.

Scalability

Enterprises aim to extend orchestration from departmental pilots to enterprise-wide deployments while ensuring resilience and performance under expanding workloads.

Customer orientation and flexibility

Providers offering tailored engagement models, configurable solutions, and responsive support are favored.

Summary analysis

Ease of use and cost remain central to buyer decisions, with a clear preference for low-code platforms that offer transparent pricing and rapid deployment.

Buyers are also placing greater emphasis on strong post-deployment support and responsive customer service as key differentiators when selecting process orchestration platforms.

In addition, IT security and governance considerations are also becoming central to buyer evaluations, with growing demand for platforms that ensure compliance and data protection.

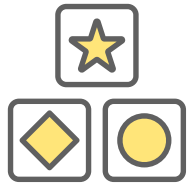
Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

Key takeaways for buyers

Enterprises should prioritize providers that can enable intelligent process orchestration combining human and digital workflows with strong governance, interoperability, and AI augmentation. Evaluation must assess providers' ability to scale, embed AI responsibly, and deliver measurable business outcomes through adaptive orchestration.

Shifts in provider capabilities

Providers are moving from rule-based workflows to AI and agentic orchestration platforms that unify automation, analytics, and governance. Buyers should assess providers on AI maturity, adaptability, and agentic orchestration readiness.



Differentiation across provider types

Large platform providers emphasize scalability and ecosystem integration, while niche providers bring domain depth and innovation in AI-driven orchestration use cases. Enterprises should balance breadth and specialization based on process complexity and digital maturity.

Key innovations

Emerging differentiators include agentic AI capabilities (pre-built agents, builders, and orchestration), adaptive process simulation, and autonomous workflow optimization using generative and predictive intelligence.

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

Appendix

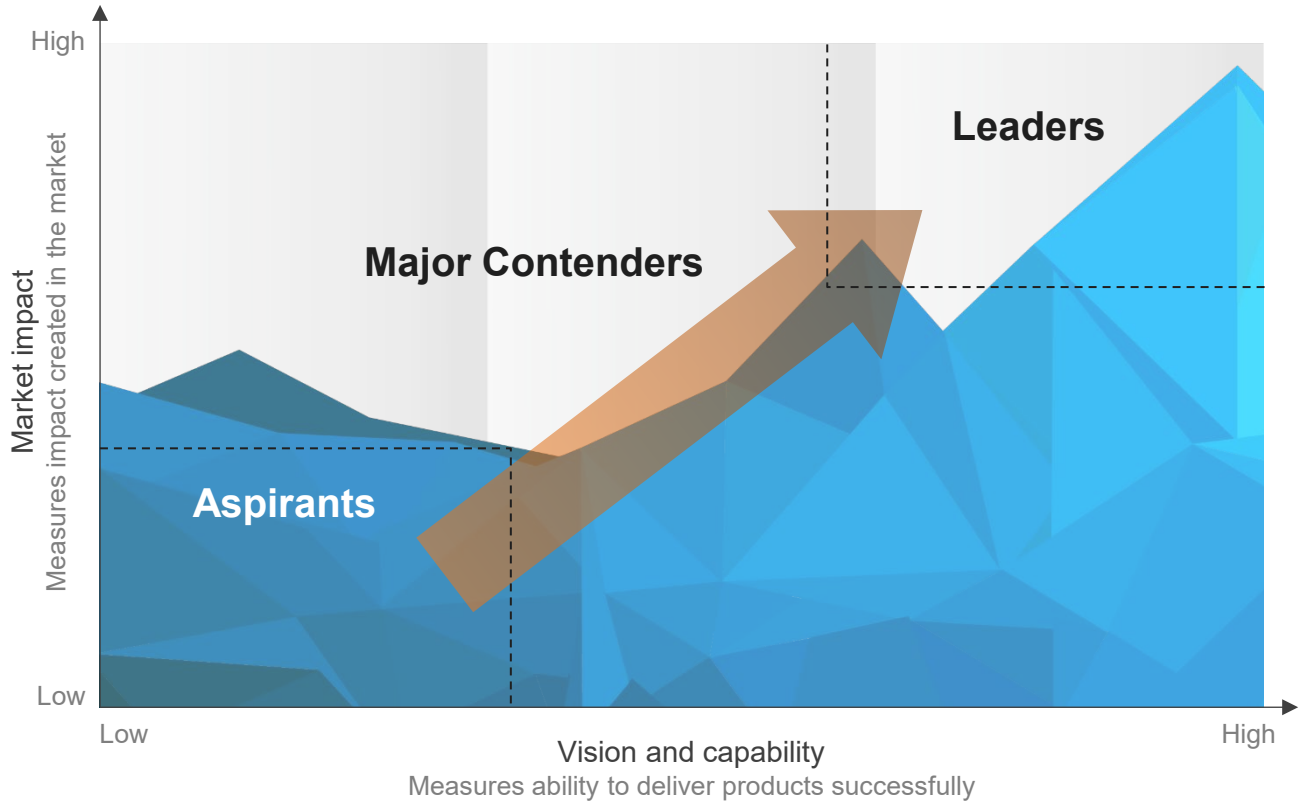
PEAK Matrix® framework

FAQs

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

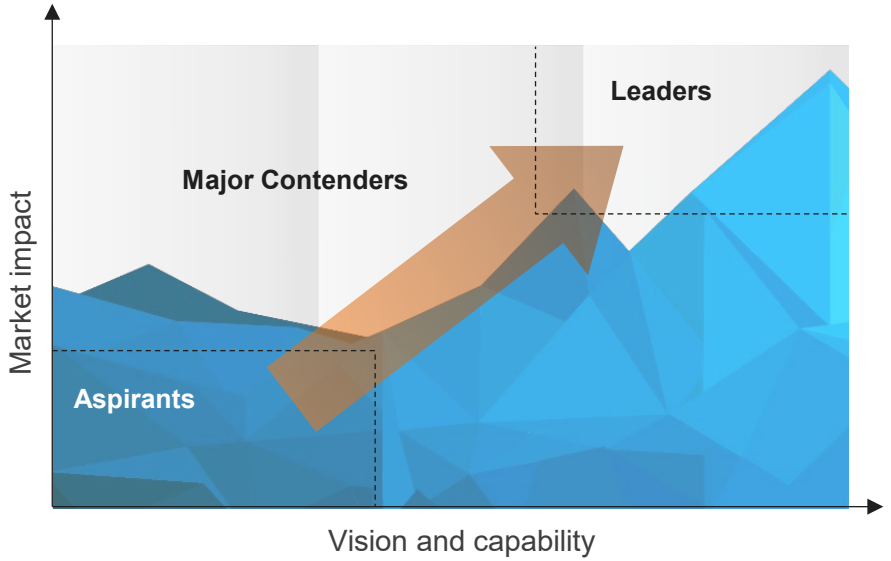
Products PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, and YoY growth

Portfolio mix
Diversity of client base across industries, geographies, environments, enterprise size class

Value delivered
Value delivered to the client based on customer feedback and other measures



Measures ability to deliver products successfully. This is captured through five subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Technology capability
Technical sophistication and breadth/depth across the technology suite

Flexibility and ease of deployment
Configurability/customize-ability, hosting and tenancy, integration, governance, and security and compliance

Engagement and commercial model
Progressiveness, effectiveness, and flexibility of engagement and commercial models

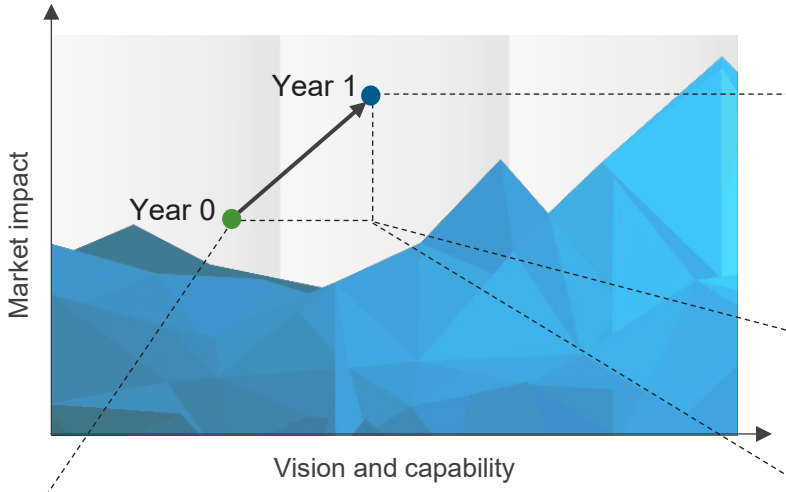
Support
Training, consulting, maintenance, and other support services

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

Everest Group confers the Star Performer title on providers that demonstrate the most improvement over time on the PEAK Matrix®

Methodology

Everest Group selects Star Performers based on the relative YoY improvement on the PEAK Matrix



In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:

- Yearly YoY revenue growth
- # of new clients
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances in **vision and capability**, we evaluate each provider's performance across a number of parameters including:

- Innovation
- Increase in product scope and functionality
- Expansion of product-associated consulting, training, support, and maintenance capabilities
- Technology/domain-specific investments

We identify the providers whose improvement ranks in the top quartile and award the Star Performer rating to those providers with:

- The maximum number of top-quartile performance improvements across all of the above parameters
  AND
- At least one area of top-quartile improvement performance in both market success and capability advancement

The Star Performer title relates to YoY performance for a given provider and does not reflect the overall market leadership position, which is identified as Leader, Major Contender, or Aspirant.

Everest Group®
Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

Everest Group® Proprietary & Confidential. © 2025, Everest Global, Inc. | this document has been licensed to **EvolutelQ**

Stay connected

Dallas (Headquarters)
info@everestgrp.com
+1-214-451-3000

Bangalore
india@everestgrp.com
+91-80-61463500

Delhi
india@everestgrp.com
+91-124-496-1000

London
unitedkingdom@everestgrp.com
+44-207-129-1318

Toronto
canada@everestgrp.com
+1-214-451-3000

Website
everestgrp.com

Blog
everestgrp.com/blog

Follow us on

Everest Group is a leading research firm helping business leaders make confident decisions. We guide clients through today's market challenges and strengthen their strategies by applying contextualized problem-solving to their unique situations. This drives maximized operational and financial performance and transformative experiences. Our deep expertise and tenacious research focused on technology, business processes, and engineering through the lenses of talent, sustainability, and sourcing delivers precise and action-oriented guidance. Find further details and in-depth content at **www.everestgrp.com**.

Notice and disclaimers

Important information. Please read this notice carefully and in its entirety. By accessing Everest Group materials, products or services, you agree to Everest Group's Terms of Use.

Everest Group's Terms of Use, available at www.everestgrp.com/terms-of-use, is hereby incorporated by reference as if fully reproduced herein. Parts of the Terms of Use are shown below for convenience only. Please refer to the link above for the full and official version of the Terms of Use.

Everest Group is not registered as an investment adviser or research analyst with the U.S. Securities and Exchange Commission, the Financial Industry Regulation Authority (FINRA), or any state or foreign (non-U.S.) securities regulatory authority. For the avoidance of doubt, Everest Group is not providing any advice concerning securities as defined by the law or any regulatory entity or an analysis of equity securities as defined by the law or any regulatory entity. All properties, assets, materials, products and/or services (including in relation to gen AI) of Everest Group are provided or made available for access on the basis such is for informational purposes only and provided "AS IS" without any warranty of any kind, whether express, implied, or otherwise, including warranties of completeness, accuracy, reliability, noninfringement, adequacy, merchantability or fitness for a particular purpose. All implied warranties are disclaimed to the extent permitted by law. You understand and expressly agree that you assume the entire risk as to your use and any reliance upon such.

Everest Group is not a legal, tax, financial, or investment adviser, and nothing provided by Everest Group is legal, tax, financial, or investment advice. Nothing Everest Group provides is an offer to sell or a solicitation of an offer to purchase any securities or instruments from any entity. Nothing from Everest Group may be used or relied upon in evaluating the merits of any investment. Do not base any investment decisions, in whole or part, on anything provided by Everest Group.

Everest Group materials, products and/or services represent research opinions or viewpoints, not representations or statements of fact. Accessing, using, or receiving a grant of access to Everest Group materials, products and/or services does not constitute any recommendation by Everest Group to (1) take any action or refrain from taking any action or (2) enter into a particular transaction. Nothing from Everest Group will be relied upon or interpreted as a promise or representation as to past, present, or future performance of a business or a market. The information contained in any Everest Group material, product and/or service is as of the date prepared and Everest Group has no duty or obligation to update or revise the information or documentation.

Everest Group collects data and information from sources it, in its sole discretion, considers reliable. Everest Group may have obtained data or information that appears in its materials, products and/or services from the parties mentioned therein, public sources, or third-party sources, including data and information related to financials, estimates, and/or forecasts. Everest Group is not a certified public accounting firm or an accredited auditor and has not audited financials. Everest Group assumes no responsibility for independently verifying such information.

Companies mentioned in Everest Group materials, products and/or services may be customers of Everest Group or have interacted with Everest Group in some other way, including, without limitation, participating in Everest Group research activities.

Everest Group®
With you on the journey