Everest Group Process Orchestration Products PEAK Matrix® Assessment 2025

Focus on **Metiz**

November 2025

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

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

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 PEAK Matrix®

Process Orchestration PEAK Matrix® Assessment 2025 | Metiz is positioned as a Major Contender

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

- ● Leaders
- ● Major Contenders
- ○ Aspirants
- ☆ Star Performers
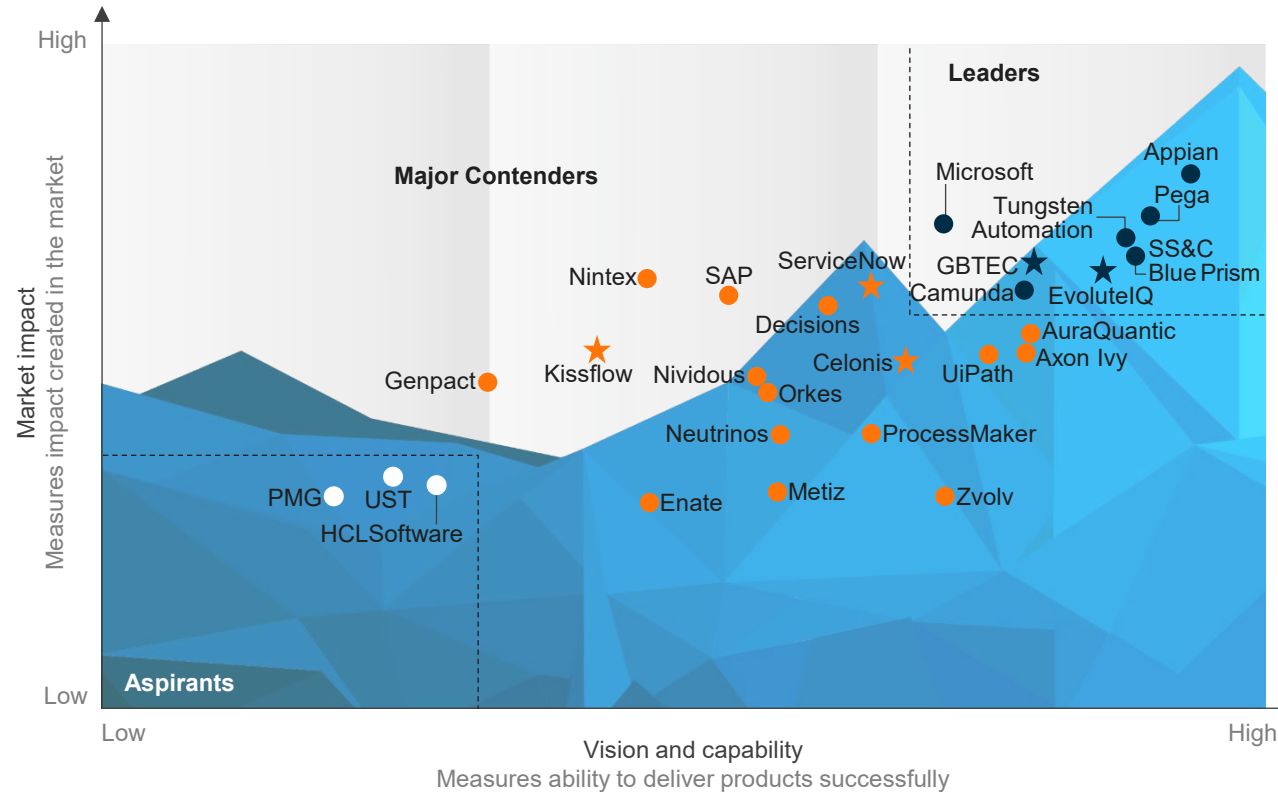
1 Assessments of Microsoft and PMG exclude provider inputs. Assessments of Axon Ivy, Camunda, Pega, SAP, and ServiceNow are based on partial inputs from the providers
Source: Everest Group (2025)

Metiz (page 1 of 2)

Everest Group assessment – Major Contender

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

- Centelon's Metiz platform combines no-code orchestration, AI-driven insights, and integration capabilities within a unified environment. These features help enterprises simplify process management, enhance agility, and improve coordination across business workflows

- Metiz offers a guided, form-driven visual builder that allows users to define process steps, conditions, and transitions. It proactively flags configuration issues, such as missing dependencies or incorrect field mappings, on a near real-time basis

- It provides a generative AI-powered chat interface that streamlines workflow development, customization, and validation. It also offers the ability to define what-if scenarios by inputting different data sets and observing the resulting decisions and outcomes

- The platform's rule designer enables users to create and modify business rules using natural language prompts, with in-app testing and AI suggestions to identify gaps. Its generative AI-based engine automatically produces syntactically correct rule scripts, reducing manual effort and improving accuracy

- Metiz provides a suite of no-code visual designers, including tools for process modeling, form creation, data modeling, and dashboard design, enabling business users to build and manage applications

- It supports integration of pre-built AI actions into workflows, allowing users to configure distinct steps within business processes. Key AI actions include form autofill, PII redaction, and automated decisioning using generative AI

- It offers AI-assisted, rules-based task allocation across human and digital workers, along with centralized exception management enabling detection, rerouting of cases, and real-time oversight through configurable dashboards and queues

- Metiz supports AI-/ML-based predictive analytics through native capabilities and external model integration, enabling early detection of process issues. It also offers the ability to answer user queries around those issues through natural language prompts

- Metiz Athena helps define AI agents for data extraction and chat-based interfaces, supports the integration and orchestration of third-party AI agents, and enables setting guardrails around these agents for secure and controlled operations

- It supports environment-agnostic deployment across on-premises, private, and public clouds using containerized microservices, and offers a modular architecture with event-driven integration

- Clients highlighted Centelon's cost-effectiveness, strong implementation support and expertise, and cognitive AI capabilities as key strengths

Metiz (page 2 of 2)

Everest Group assessment – Major Contender

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

- Centelon generates the majority of its revenue from APAC and MEA regions, while it does not have experience in serving clients in North America, the UK, Continental Europe, and LATAM

- Its customer base is primarily concentrated in the banking and capital markets, government and public sector, and CPG and retail industries, and it has limited experience in serving clients in other high-growth sectors such as insurance, manufacturing, hi-tech and telecom, and healthcare and pharma

- The platform currently lacks a drag-and-drop interface for creating and documenting process maps and does not yet offer AI-driven workflow analysis for optimization, though both capabilities are in the roadmap

- It does not include a step-by-step wizard to guide users through application development, which may hinder onboarding for non-technical users. It also lacks the ability to generate forms and applications using natural language prompts

- The platform does not offer real-time process performance monitoring using AI, limiting users' ability to proactively address operational inefficiencies

- It currently lacks partnerships with complementary technologies such as RPA, IDP, process mining, task mining, generative AI, or agentic AI, limiting its integration ecosystem

- The platform is not certified with security standards such as SOC, GDPR, and HIPAA, which may restrict its adoption in regulated industries

- It does not offer training and certification through certified partners, nor does it provide online certification courses or free training modules, which may impact user enablement

- There is scope for Centelon to enhance product support by offering 24/7 assistance for all clients, launching an online user community and support forum, and providing a free community version of the platform

- Clients indicated that Centelon could improve by attaining stronger security certifications and enhancing model transparency, which would help build greater trust and credibility for enterprise adoption

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.

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
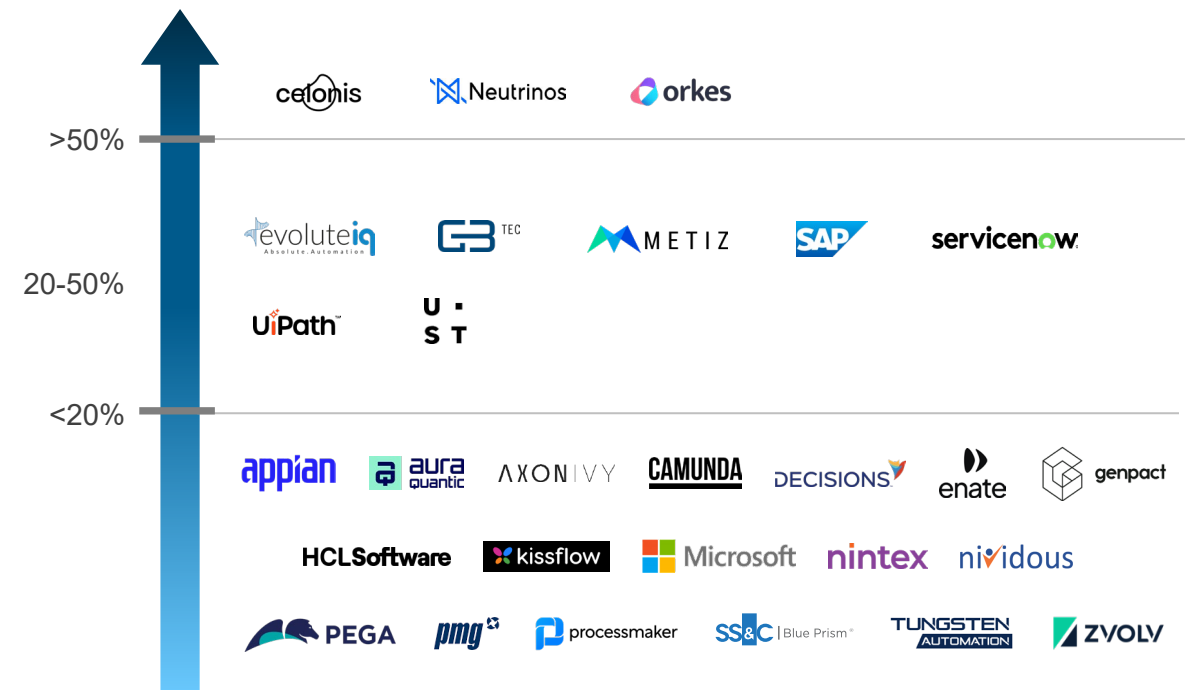
Market share analysis of the providers[1]

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

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

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.

Medium

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.

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.
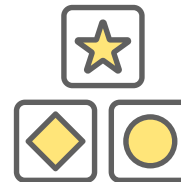
Differentiation across provider types

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.
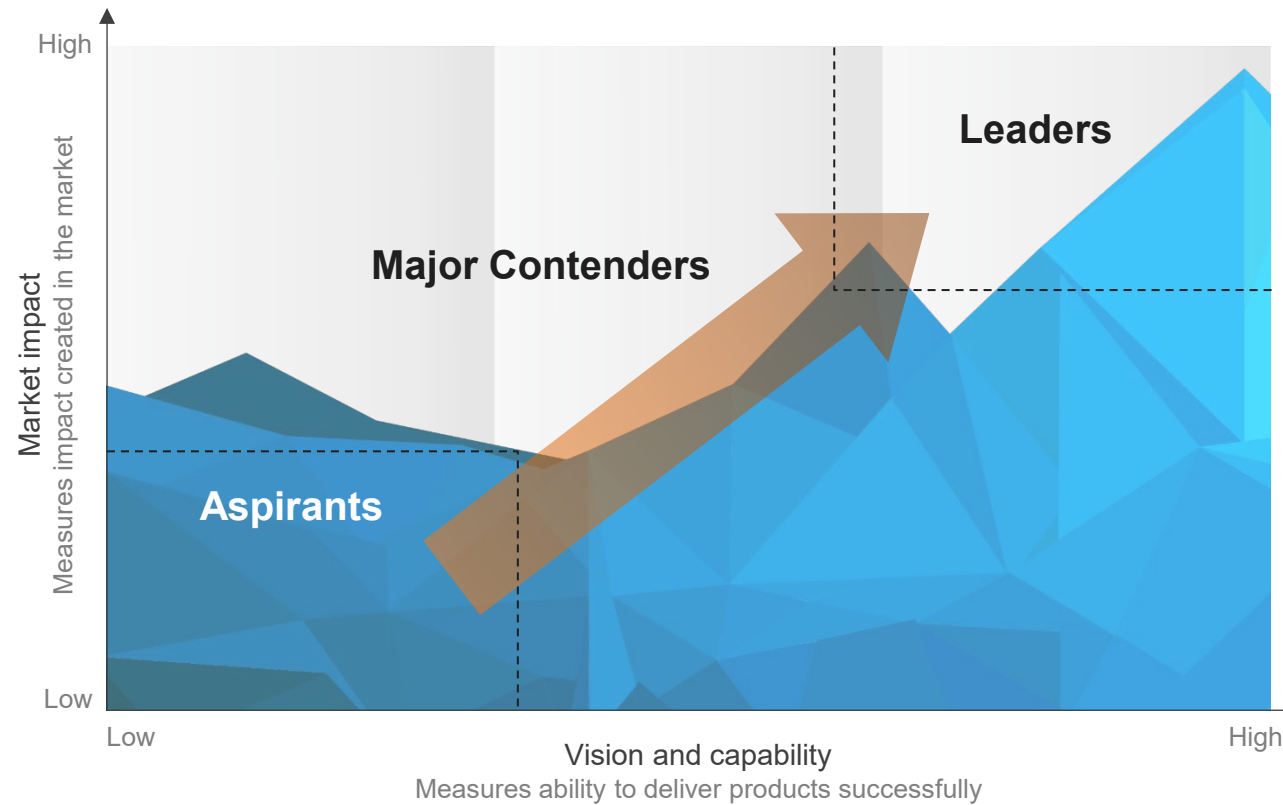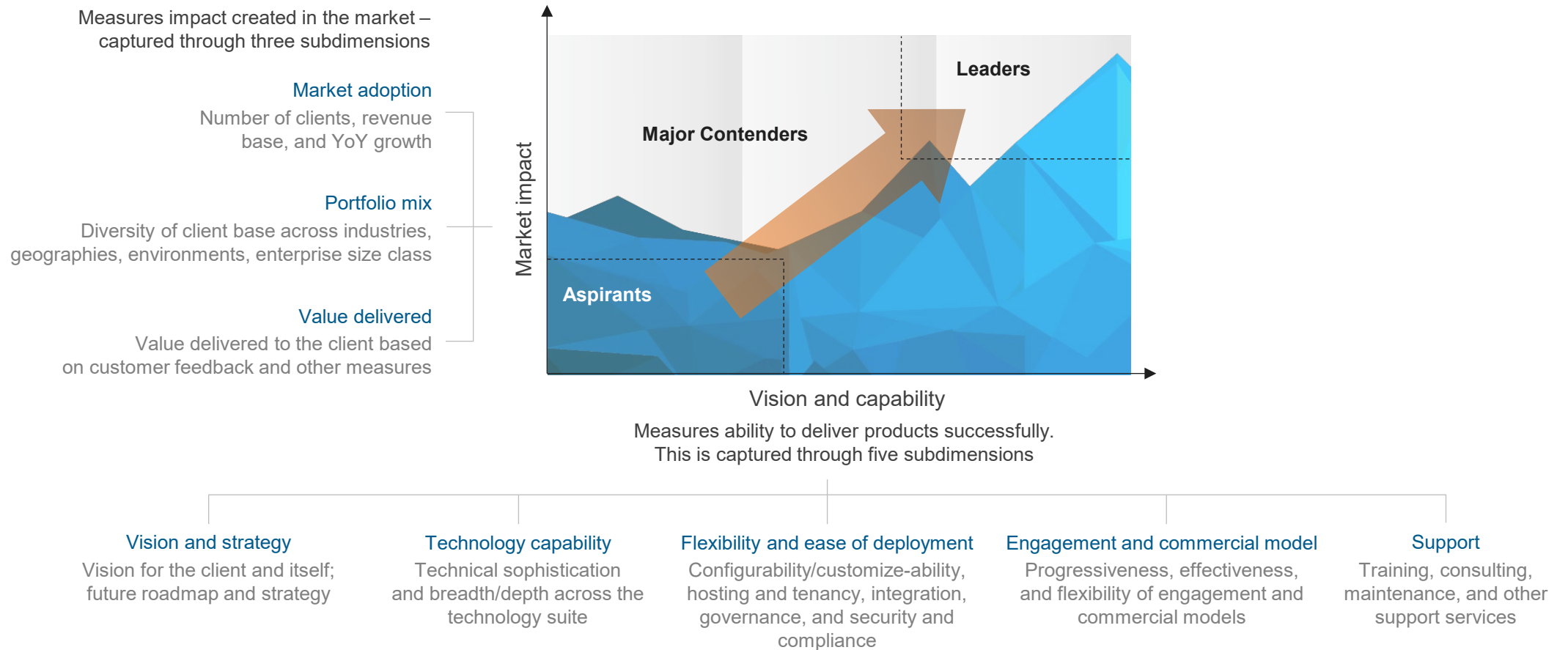
Appendix

PEAK Matrix® framework

FAQs

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

Everest Group PEAK Matrix

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

Market impact

Leaders

Major Contenders

Aspirants

Vision and capability

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

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.

Stay connected

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®
With you on the journey