Competitive Intelligence: Celonis Process Mining Market Positioning

Date: November 2025 | **Confidential:** Matrix Intelligence

Executive Summary: Process Mining Competitive Landscape

Celonis dominates the process mining market but faces increasing competition from RPA players expanding into process intelligence and specialized vertical solutions.

Competitor	Market Position	Threat Level	Key Differentiator	Target Segment
UiPath Process Mining	RPA Leader Expanding	HIGH	RPA integration, automation suite	Existing UiPath customers
SAP Signavio	ERP Integrated	HIGH	SAP ecosystem, process governance	SAP enterprise customers
IBM Process Mining	Enterprise IT Focus	MEDIUM	IBM ecosystem, AI capabilities	Large enterprises, regulated industries
Appian Process Mining	Low-Code Platform	MEDIUM	Low-code automation integration	Digital transformation projects

1. UiPath Process Mining (HIGH THREAT)

Strengths	Weaknesses	Opportunities	Threats
• Large RPA customer base • Strong automation capabilities • Enterprise sales motion • Process discovery integration • Competitive pricing	• Late to process mining • Less sophisticated algorithms • Limited EMS vision • Integration complexity • Brand association with RPA only	• Cross-sell to RPA base • End-to-end automation • Process discovery upsell • Mid-market expansion	• Celonis EMS differentiation • Superior process intelligence • Stronger enterprise relationships • Better visualization capabilities

2. SAP Signavio (HIGH THREAT in SAP ecosystem)

Strengths	Weaknesses	Opportunities	Threats
• Deep SAP integration • Process governance focus • Strong European presence • SAP sales channel • Process collaboration features	• Limited outside SAP ecosystem • Less advanced AI capabilities • Slower innovation pace • Higher implementation complexity • Weaker US market position	• SAP customer base expansion • Process governance demand • European market leadership • Compliance-driven projects	• Celonis multi-ERP capability • Superior AI/ML algorithms • Better user experience • Stronger US enterprise presence

Technical Capability Comparison

Feature	Celonis	UiPath	SAP Signavio	Competitive Advantage
Process Discovery	Excellent	Good	Good	Celonis leader in algorithms
AI/ML Capabilities	Advanced	Basic	Medium	Celonis significant advantage
Multi-System Support	Excellent	Good	Limited (SAP-focused)	Celonis multi-ERP strength
Execution Management	Pioneer	Basic	Limited	Celonis platform differentiation
Real-time Monitoring	Excellent	Good	Medium	Celonis performance advantage

Market Share & Customer Segmentation

Segment	Celonis Share	UiPath Share	SAP Signavio Share	Growth Trend
Fortune 500	45%	18%	22%	Celonis +5% YoY
Manufacturing	38%	25%	20%	UiPath +8% YoY
Financial Services	42%	15%	18%	Celonis +6% YoY
SAP Customers	35%	12%	40%	SAP Signavio +10% YoY

Strategic Competitive Recommendations

Priority	Competitive Action	Target Competitor	Expected Impact
HIGH	Accelerate EMS platform differentiation	All competitors	+25% enterprise win rate
HIGH	Develop SAP coexistence strategy	SAP Signavio	+15% SAP customer penetration

MEDIUM	Enhance automation integration capabilities	UiPath	+20% competitive displacement
MEDIUM	Expand industry-specific solutions	IBM, Appian	+30% vertical market share