



Everest Group PEAK Matrix[®] for Intelligent Process Automation (IPA) Solutions Provider 2023

Focus on Capgemini
April 2023



Introduction

The need for evolving into a digital-first business is becoming increasingly important for organizations in order to remain resilient and competitive. Manual operations pose numerous challenges, and hence, organizations are trying to shift to digital, automated, and intelligent business processes. Digital technologies, including IA, are becoming ubiquitous. Enterprises are expected to rely on IA as a key lever to enable cost optimization, which is a top priority for enterprises in the current recessionary environment. Solution providers have recognized the demand and are pivoting quickly to a digital-powered model to provide these benefits to their buyers. One of the most potent digital levers enabling this transformation is Intelligent Process Automation (IPA).

Everest Group defines IPA as IA in business processes achieved through any combination of automation technologies such as Robotic Process Automation (RPA) and cognitive-/AI-based automation. The scope of this report includes:

- IPA solutions: sourcing of IPA technology products along with consulting, implementation, and maintenance services; but no traditional BPO services
- IPA services only: sourcing of IPA services such as consulting, implementation, and maintenance

This report does not cover IPA technology products that are licensed independently or embedded within broader BPO deals.

In the full report, [Intelligent Process Automation \(IPA\) PEAK Matrix® Assessment 2023](#), we analyze the IPA solution provider landscape across various dimensions:

- Everest Group's PEAK Matrix® evaluation, a comparative assessment of 27 leading IPA solution providers
- Competitive landscape in the IPA solution provider market
- Remarks on key strengths and limitations for each IPA solution provider

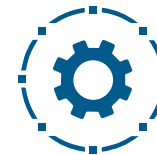
Scope of this report



Geography
Global



Solutions
Intelligent Process Automation (IPA)



Solution Providers
27 leading IPA solution providers

IPA solutions PEAK Matrix® characteristics

Leaders:

Accenture, Capgemini, Cognizant, IBM, TCS, and Wipro

- Leaders continue to focus on building technology capabilities, especially around cognitive automation, low-code/no-code, expanding partner ecosystems, and developing reusable assets, accelerators, and packaged solutions across business processes to meet client requirements and improve the speed of deployment
- Leaders leverage their superior consulting, implementation and maintenance capabilities, and training offerings, to address emerging needs such as sustainability and citizen development, and drive enterprise-wide intelligent automation initiatives

Major Contenders:

Accelirate, Datamatics, EXL, Firstsource, Genpact, HCLTech, LTIMindtree, Mphasis, NTT DATA, Persistent Systems, PwC, Roboyo, Softtek, Sopra Steria, Sutherland, Tech Mahindra, and UST

- Major Contenders trail behind Leaders in terms of the market adoption of intelligent automation solutions, organic/inorganic investments to propel innovation, and the spread of their solution portfolios across industries, geographies, or business functions
- They have exhibited responsiveness to market requirements and have developed relatively strong cognitive automation capabilities such as as-a-Service (aaS) offerings. They have also come a long way in offering progressive engagement models and helping establish/enhance CoEs in client environments

Aspirants:

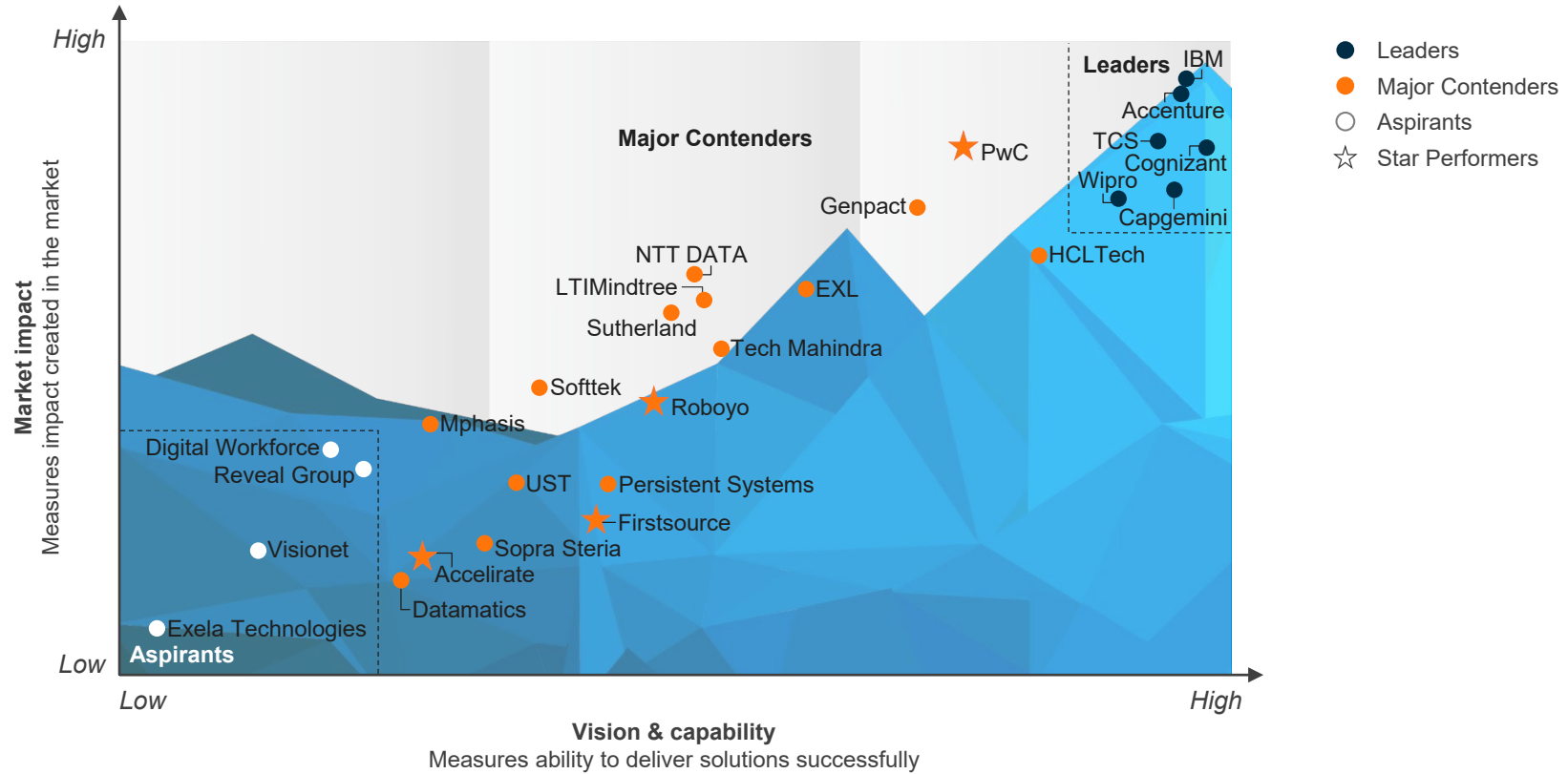
Digital Workforce, Exela Technologies, Reveal Group, and Visionet

- While Aspirants are differentiating themselves by their niche consulting capabilities and the value delivered to clients in terms of proactively modifying their automation offerings to suit enterprise business needs, they need to supplement these with better technology innovations and enabling a greater push for market adoption
- Most Aspirants face concentration risk in terms of clients from a specific geography or industry. They need to expand their business function, industrial, and geographic reach to drive revenue growth in the competitive IPA market

Everest Group PEAK Matrix®

IPA Solutions PEAK Matrix® Assessment 2023 | Capgemini positioned as Leader

Everest Group Intelligent Process Automation (IPA) – Solutions PEAK Matrix® Assessment 2023¹



¹ Assessment for Digital Workforce excludes solution provider inputs on this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary TI database, ongoing coverage of the solution provider, its public disclosures, and interaction with buyers. For this company, Everest Group's data for assessment may not be complete

Source: Everest Group (2023)

Capgemini | IPA solutions profile (page 1 of 4)

Overview

Company mission/vision statement

Capgemini's vision is to infuse Triple-A (Artificial Intelligence, Analytics, and Automation) at the heart of every business process transformation. Capgemini understands dynamic market demand and represents outcome-focused approach, offering a wide range of sustainable operations. By leveraging assets and frameworks around AI, process analytics, and IA, Capgemini delivers value and business process optimization to clients at scale. The provider tailors this transformation per domain and per sector to help its clients transition to the Frictionless Enterprise, one that is free from institutionalized friction and has a seamless flow of operations.

Headquarters: Paris, France

Website: www.capgemini.com

Key leaders

- Oliver Pfeil: CEO of Business Services
- Sebastien Guibert: Business Services Portfolio Head & Global Offer Leader for IPA
- Marek Sowa: IPA Offer Leader for Capgemini Group

Recent deals and announcements (not exhaustive)

- October 2022: signed an agreement to acquire Quantmetry & Braincourt to enrich data & AI capabilities
- August 2022: announced global alliance with Unity for immersive & metaverse experiences
- June 2022: named as partner of the year by Microsoft Power Apps
- June 2022: named as EMEA Services partner of the year by Google Cloud

Key clients

Not disclosed

■ Offered ■ Not offered

Commercial model

Input-/FTE-/T&M-based	■	Outcome-based	■
Fixed price model	■	Transaction-based	■

As-a-Service offering

RPA-as-a-Service (RPAaaS) / Intelligent Automation-as-a-Service (IAaaS)	■
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Key locations with IPA FTEs

North America	Asia Pacific	UK and EMEA	Latin America
US and Canada	India and China	UK, Poland, Romania, Nordic countries, France, Germany, Spain, and Italy	Guatemala

Adoption and capability overview

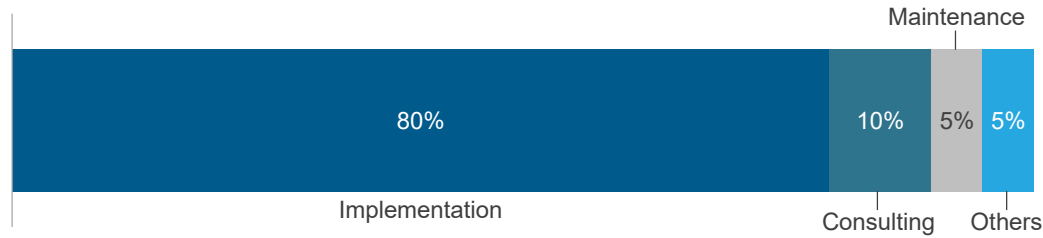
Number of clients: 375	Number of IPA FTEs: 6,100
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Capgemini | IPA solutions profile (page 2 of 4)

Capabilities

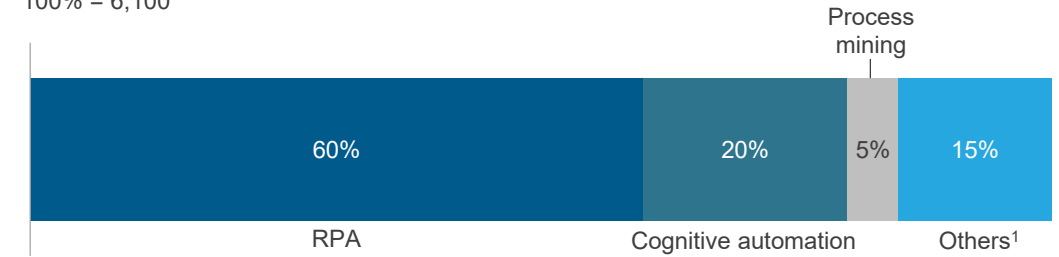
Split of IPA FTEs by scope of services

100% = 6,100

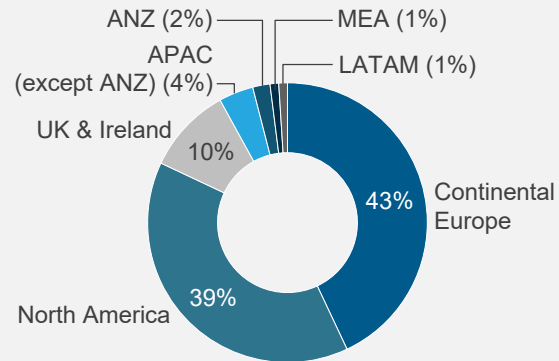


Split of IPA FTEs by automation type

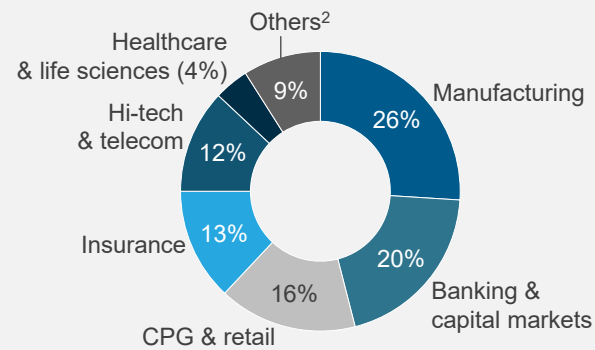
100% = 6,100



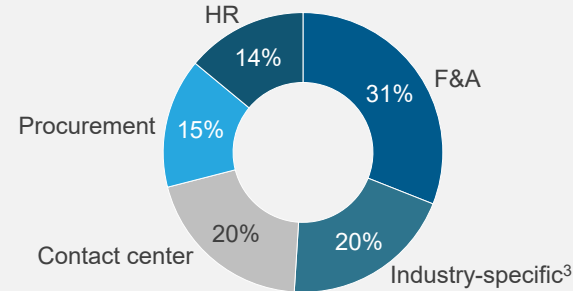
IPA revenue mix by buyer geography



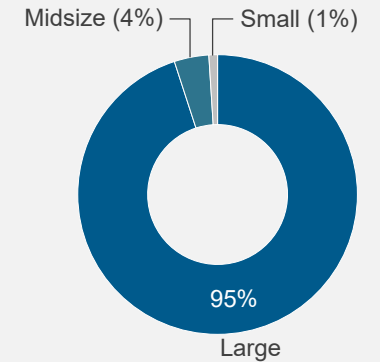
IPA revenue mix by buyer industry



IPA revenue mix by business function / process area



IPA revenue mix by buyer size⁴



1 Others include advanced or AI-based analytics FTEs

2 Others include government & public sector, travel & logistics, and energy & utilities industries

3 Industry-specific processes for IPA revenue mix by business function include banking, insurance, capital market, healthcare & life sciences, HTME, CPG & retail, manufacturing, and utilities industry-specific processes

4 Buyer size is defined as large (>US\$5 billion in revenue), midsize (US\$1-5 billion in revenue), and small (<US\$1 billion in revenue)

Source: Everest Group (2023)

Capgemini | IPA solutions profile (page 3 of 4)

Solutions portfolio











Solutions	RPA	IDP	Conversational AI	AI advisor tools	AI-based analytics tools	Process mining	Task mining	Workflow/orchestration
Third-party solutions provider	UiPath, Blue Prism, Automation Anywhere, Microsoft, WorkFusion, Pega, Nintex, IBM, NICE, SAP, and Robot Framework	ABBYY, Kofax, UiPath, Blue Prism, Automation Anywhere, WorkFusion, Parascript, SAP, Microsoft, AYR.AI, and Celaton	Microsoft, Google, Amelia, Kore.ai, SAP, IBM, Rasa, and SoundHound	Dataiku, H2O.ai, IBM, Google, Amazon, Microsoft, DataRobot, Yseop, Arria NLG, Pega, UiPath, Blue Prism, Salesforce, and Adobe	Dataiku, DataRobot, H2O.ai, Neo4J, Microsoft, IBM, SAP, Salesforce, Google, Microsoft, Alteryx, DataKitchen, and Snowflake	Celonis, Microsoft, ABBYY, UiPath, QPR, IBM, SAP Signavio, and BusinessOptix	Celonis, ABBYY, UiPath, Nintex, and Microsoft	Pega, Appian, Nintex, Trintech, ServiceNow, Blueprint, Workday, Microsoft, and Salesforce
Proprietary solutions offered	Capgemini Enterprise Automation Fabric (EAF)	Capgemini Document AI, Cognitive Document Processing (CDP), Capgemini DeepExtract, and IPA Document Understanding Toolkit (IPA Verse), Language Dependency Reduction for Documents, and PII removal for Documents	Central Management Application, ActionBots, AIMiLi0, and CHIP	Capgemini IDEA, Capgemini AI NEXT, Capgemini AI Flip, Capgemini AI HELPDESK, Cash Collection Assistant, AI Early Warning System for Contact Center, Knowledge Insights Services (KIS), and Data Labeling Services (DLS) – ML Assisted Labeling, IPA Intelligent Agent Recommender, and Angee	890 by Capgemini, AI Glassbox, Capgemini Business Command Center, Contact Center Analytics, and ALira (HR Analytics), and Intelligent Demand Sensing	Capgemini's Digital Twin for Operations	Capgemini PROMPT	CategorizeAI and IPA Intelligent Orchestrator

Top packaged solutions	Process area	Deployment options	Description	No. of clients
890 by Capgemini	Across multiple processes	On-premise, cloud (private and public), and hybrid	A cataloged platform and an enterprise-wide AI marketplace that enables organizations to quickly gain access to key analytical and AI solutions such as NLP/NLG, predictive analytics, voice processing, computer vision, case and document processing, and supervised and unsupervised algorithms	50
Capgemini IDEA	Across multiple processes	On-premise and public cloud	A set of industrialized data & AI engineering accelerators, leveraging DataOps, DevOps, and MLOps features, allowing clients to accelerate time-to-value and decrease setup cost with data & AI platforms	50
Capgemini Digital Twin for Operations	Across multiple processes	Cloud (private and public) and hybrid	A solution that creates a virtual representation of a function using process mining to provide operational telemetry; generated process models are used to identify bottlenecks and inefficiencies and perform simulation analysis	30
Enterprise Automation Fabric	Across multiple processes	Cloud (private and public)	A IAaaS platform with near real-time robot monitoring, analytics, and control; it also contains reusable and off-the-shelf assets/robots that deliver holistic IA into business and IT operations	40+

Capgemini | IPA solutions profile (page 4 of 4)

Everest Group assessment – Leader

Measure of capability:  Low  High

Market impact				Vision & capability					
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Technology capability	Services capability	Innovation and investments	Engagement and commercial model	Overall
									

Strengths

- Capgemini’s vision is to help enterprises accelerate their automation journey through reusable & interconnected industry-specific automation competences, by leveraging both proprietary and third-party capabilities
- It has several process mining and task mining partnerships. It also has a digital twin offering that creates a virtual representation of the finance function using process mining to identify bottlenecks and inefficiencies
- Its Enterprise Automation Fabric (EAF) is a unified platform that has inter-related IT and business KPIs enabling real-time robot deployment, monitoring, AIOps integration, analytics, and controls across IT and business processes
- Capgemini has high focus on building AI-based IPs and accelerators such as cognitive query management, text information extractor, machine translation toolkit, data labelling, and pre-defined set of tools, packages, and assets to validate each AI/ML life cycle phase and produce feedback reports. Its clients’ leveraging of cognitive capabilities has also increased in the last 12-18 months
- It has built many proprietary frameworks for its consulting services that includes maturity assessment, technology advisory, CoE setup, governance, and organizational change management. Its clients also applaud the expertise and availability of consultants
- It helps clients automate the monitoring and reporting of ESG metrics and offers ESG advisory and sustainable transformation services
- Clients highlight Capgemini’s experience, technical knowledge, cost competitiveness, professionalism, implementation, and maintenance as some of its key strengths

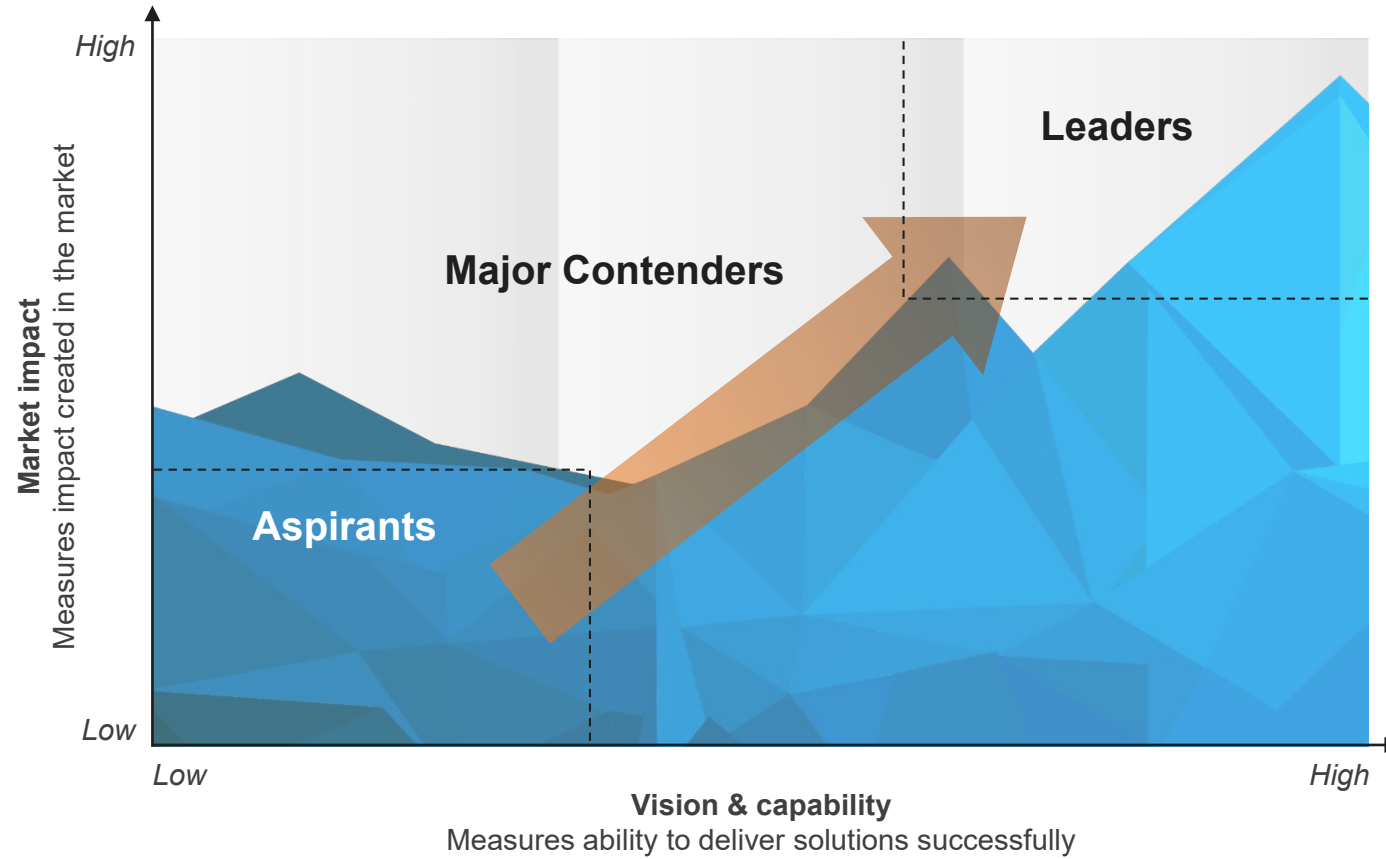
Limitations

- The majority of its clients are companies with more than US\$5 billion annual revenue; its client base in the midsize and small enterprise segments is limited
- Its experience in implementing IPA for a large number of processes within a client organization is relatively limited. Clients have highlighted the ability of scaling up as one of the key areas of improvement for Capgemini
- Although it offers advanced outcome-based pricing model to clients, the adoption level is relatively less compared to its peers
- Clients expect quicker turnaround time and less rotation of resources. They also expect better knowledge of business processes from Capgemini’s resources

Appendix

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

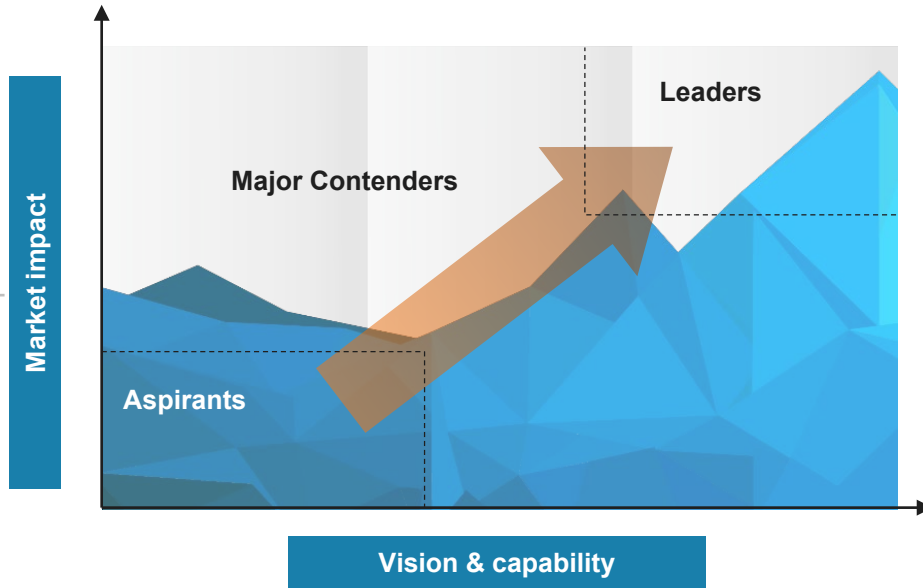
Everest Group PEAK Matrix



Solutions PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

- Market adoption**
Size and growth of deployments across the solution portfolio
- Portfolio mix**
Solution footprint across geographies, industries, and buyer size segments
- Value delivered**
Value delivered to the client based on customer feedback and other measures



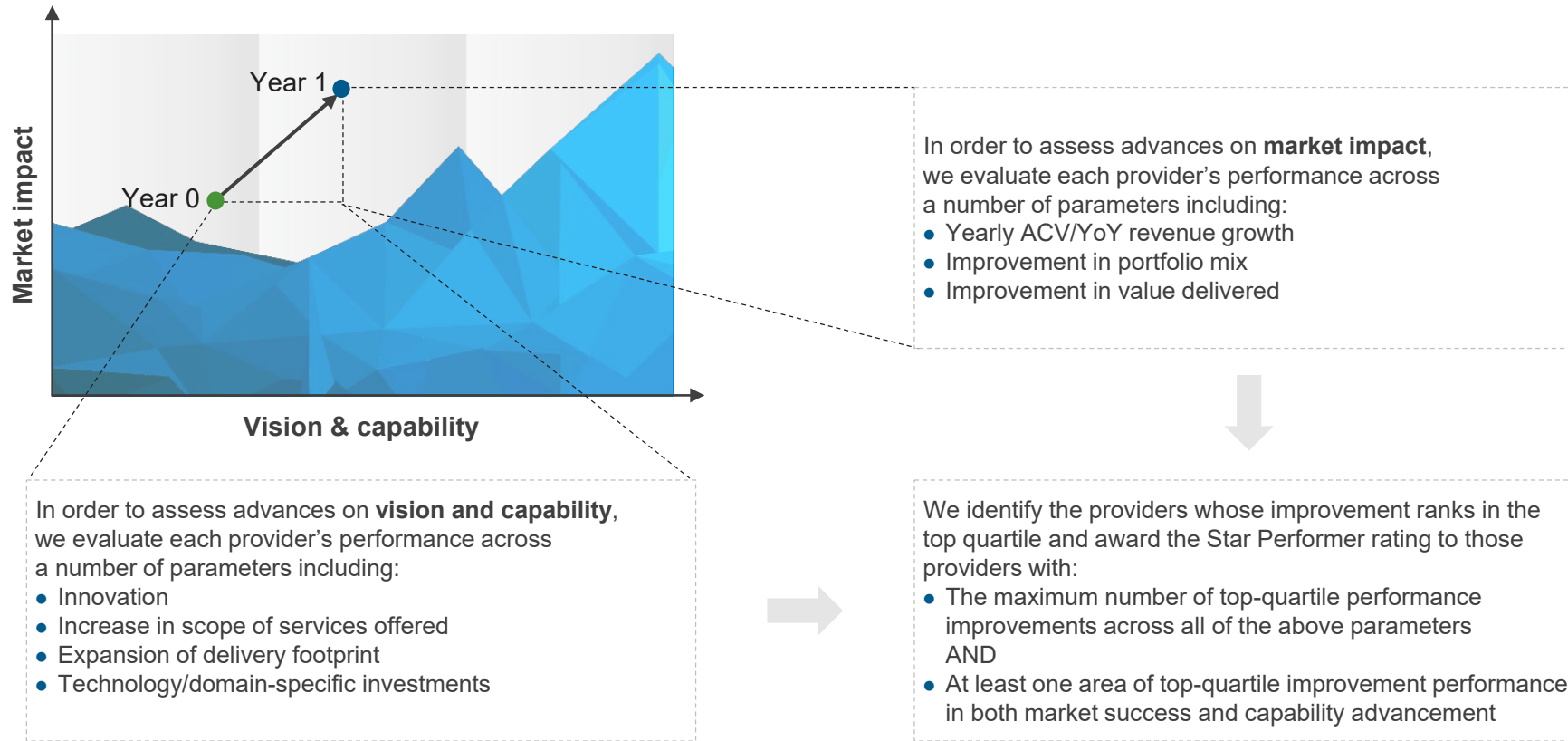
Measures ability to deliver solutions successfully. This is captured through five subdimensions

- Vision and strategy**
Vision for the client and itself; future roadmap and strategy
- Technology capability**
Technical sophistication and breadth/depth across the technology suite
- Services capability**
Effectiveness and breadth/depth of services portfolios across the services suite
- Innovation and investments**
Innovation and investment in the solution suite
- Engagement and commercial model**
Progressiveness, effectiveness, and flexibility of engagement and commercial models

Everest Group confers the Star Performers 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



The Star Performers 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.

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

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.

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

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.

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

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.

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

- 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 included in our research reports

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

- 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](#)

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

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 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.

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