

Everest Group PEAK Matrix® for Intelligent Process Automation (IPA) Providers 2022

Focus on Capgemini
March 2022



Background of the research

Evolving into a digital-first business is becoming increasingly important for organizations to remain resilient and competitive, especially after the pandemic. Manual operations pose numerous challenges, and hence, organizations are trying to shift to digital, automated, and intelligent business processes. Digital technologies, including Intelligent Automation (IA), are becoming ubiquitous. Apart from seeking cost reduction and operational efficiency from their transformation initiatives, enterprises are expecting next-generation benefits such as superior customer experience. 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 product 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 this study, we analyze the IPA solution provider landscape across various dimensions:

- Everest Group’s PEAK Matrix® evaluation, a comparative assessment of 28 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
28 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, expanding partner ecosystems, and developing reusable assets and accelerators across business processes to meet client requirements and improve speed of deployment
- Leaders leverage their superior implementation and maintenance capabilities, training offerings, and differentiated solutions, such as packaged solutions for specific processes, to address emerging needs and drive enterprise-wide IA initiatives

Major Contenders:

Atos, Datamatics, Digital Workforce, EXL, Firstsource, Genpact, HCL Technologies, Infosys, Mphasis, NTT DATA, Persistent Systems, PwC, Roboyo, Softtek, Sopra Steria, Tech Mahindra, UST, and Virtusa

- Major Contenders trail Leaders in terms of market adoption of IA 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. They have also come a long way in offering progressive engagement models and helping establish/enhance CoEs in client environments

Aspirants:

Accelirate, iOPEX, SS&C Technologies, and Visionet

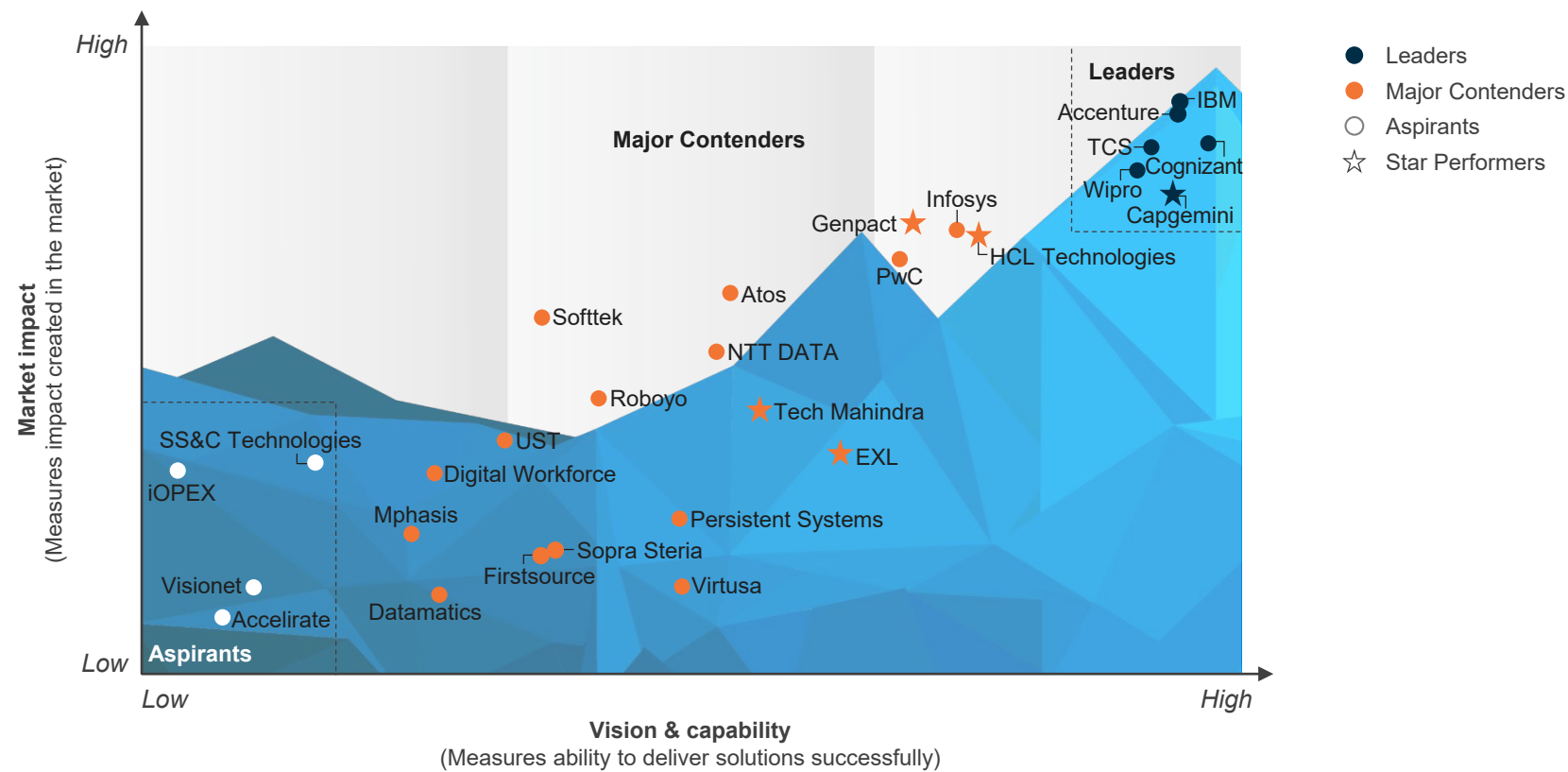
- While Aspirants aim to proactively modify their automation offerings to suit enterprise business needs, they need to supplement these with better technology innovations and greater push for market adoption
- Most Aspirants face concentration risk in terms of clients from a specific geography or industry.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

Everest Group PEAK Matrix®

Intelligent Process Automation (IPA) Solutions PEAK Matrix® Assessment 2022 | Capgemini positioned as Leader and Star Performer



Everest Group Intelligent Process Automation (IPA) Solutions PEAK Matrix® Assessment 2022¹



¹ Assessment for Atos, Infosys, and PwC excludes solution provider inputs on this particular study and is based on Everest Group's estimates that leverage Everest Group's proprietary Transaction Intelligence (TI) database, ongoing coverage of these solution providers, their public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may not be complete.
Source: Everest Group (2022)

Capgemini | IPA solutions profile (page 1 of 4)

Overview

Company mission/vision statement

Capgemini’s vision is to infuse Triple-A (Artificial Intelligence (AI), Analytics, and Automation) at the heart of every business process transformation. By leveraging all assets and frameworks around AI, process analytics, and IA, Capgemini delivers added 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

- Sebastien Guibert: Group IPA Offer Leader
- Patrick Nicolet: CTO
- Anne-Laure Thieullent: Group AI & Analytics Leader
- Carole Ferrand: CFO

Adoption and capability overview

- Number of IPA FTEs: 6,000+
- Number of clients: 405+





Key clients


AECOM, Audi, BOSCH, Black&Veatch, Cognex, CONA, Enedis, Hellmann, HMRC, Ibaraki, Nordic Capital, Spie, SNCF, SEeMax, TE Connectivity, and Zurich

Key locations with IPA FTEs

- North America: the US and Canada
- UK and EMEA: the UK, Poland, Romania, the Nordic countries, France, and Germany
- Asia Pacific: India and China
- Latin America countries

 Offered  Not offered

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

As-a-Service offering	
RPA-as-a-Service (RPAaaS) / Intelligent Automation-as-a-Service (IAaaS)	

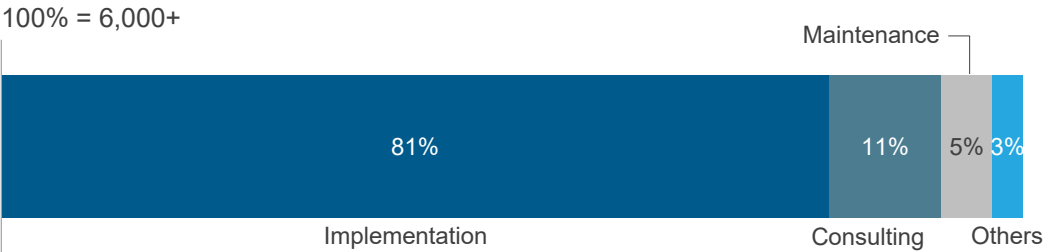
Recent deals and announcements (not exhaustive)

- October 2021: entered into a >US\$200 million deal with a leading logistics company infusing Triple-A in their transformation journey
- September 2021: partnered with Copado, a leading DevOps platform for enterprise Software-as-a-Service (SaaS), to accelerate CX transformation for its clients and enhance returns on Salesforce investments
- June 2021: partnered with Dassault Systèmes, a French software company, to help organizations evolve toward becoming intelligent enterprises
- January 2021: introduced Digital Global Enterprise Model.AI (D-GEM.AI) to support global operation transformation programs with new advancements in the AI space
- June 2020: partnered with BlackLine, a software company, to enable and optimize its finance and accounting process using AI & RPA

Capgemini | IPA solutions profile (page 2 of 4)

Capabilities

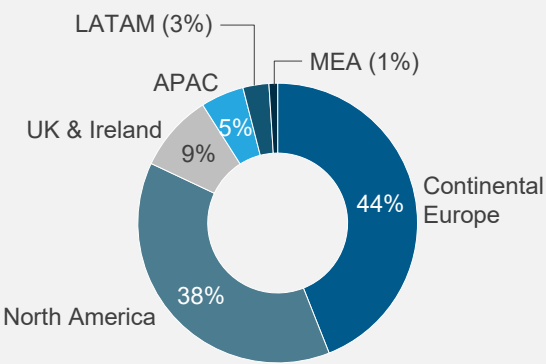
Split of IPA FTEs by scope of services



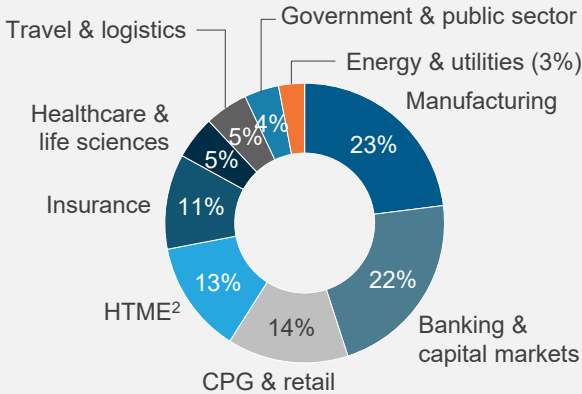
Split of IPA FTEs by automation type



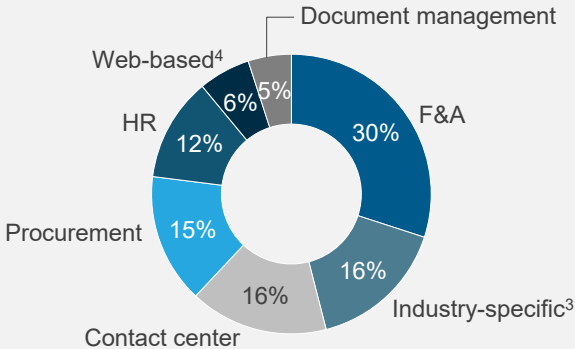
IPA revenue mix by buyer geography



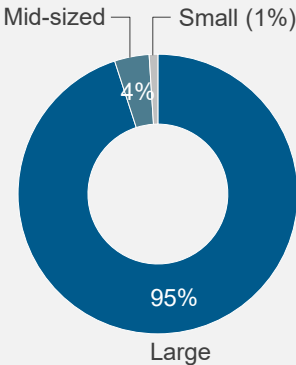
IPA revenue mix by buyer industry



IPA revenue mix by business function / process area



IPA revenue mix by buyer size⁵



1 Others include hybrid, digital adoption, advanced analytics, and research FTEs.
2 HTME stands for Hi-tech, Telecom, Media, and Entertainment industry-specific.
3 Industry-specific processes for IPA revenue mix by business function include banking, insurance, capital market, healthcare & life science, HTME, manufacturing, and CPG & retail industry-specific processes.
4 Web-based includes web-based, e-commerce, or digital self-service transaction processing.
5 Buyer size is defined as large (>US\$5 billion in revenue), mid-sized (US\$1-5 billion in revenue), and small (<US\$1 billion in revenue).
Source: Everest Group (2022)

Capgemini | IPA solutions profile (page 3 of 4)

Solutions portfolio











Solutions	RPA	Intelligent Document Processing (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 (Kryon), NICE, and SAP	ABBYY, Kofax, UiPath, Blue Prism, Automation Anywhere, WorkFusion, Parascript, SAP, and Celaton	Microsoft, Google, Amelia, Kore.ai, SAP, IBM, Rasa, and SoundHound	Dataiku, H2O.ai, IBM, Google, 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, Minit, ABBYY, UiPath, QPR, Nintex (Kryon), IBM (myInvenio), SAP, and BusinessOptix	Celonis, ABBYY, UiPath, Nintex (Kryon), Automation Anywhere (Fortress IQ), Blue Prism, and Microsoft	Pega, Appian, Nintex, Trintech, ServiceNow, BluePrint, Workday, and Salesforce
Proprietary solutions offered	Capgemini Intelligent Automation Platform (CIAP)	Capgemini Document AI, Cognitive Document Processing (CDP), Capgemini DeepExtract, and IPA Document Understanding Toolkit (IPA Verse)	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	890 by Capgemini, AI Glassbox, Capgemini Business Command Center, Contact Center Analytics, and ALira (HR Analytics)	Capgemini's Digital Twin for Operations		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	48+
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	25+
Capgemini Intelligent Automation Platform (CIAP)	Across multiple processes	Cloud (private and public)	An IAaaS platform that enables 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	120+ (including clients using components)
Capgemini Digital Twin for Operations	Across multiple processes	Cloud (private and public) and hybrid	This solution 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.	12+
IPA AI Prism	Across multiple processes	On-premise, cloud (private and public), and hybrid	This solution offers NLP capabilities, including classification, summarization, named-entity recognition and linking, PII/PMI identification, custom business glossaries, and topic modeling capabilities, custom-built for IPA use cases.	10+

Capgemini | IPA solutions profile (page 4 of 4)

Everest Group assessment – Leader and Star Performer

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 focuses on data-centricity and builds its solutions portfolio to bring tangible business outcomes through the convergence of AI, analytics, and automation
- It has a sizable partner ecosystem and client experience across IA components, including RPA, IDP, process mining, and orchestration. It offers many packaged solutions across business processes such as F&A, HR, and other industry-specific processes
- Its IA platform, Capgemini Intelligent Automation Platform (CIAP), helps in automation recommendation, real-time robot monitoring, analytics, and control
- It has an extensive library of AI use cases and pre-trained accelerators, including automated robot platform migration and data labeling
- It has built many proprietary frameworks for its consulting services that include maturity assessment, technology advisory, CoE setting up, and organizational change management
- Clients appreciate its automation knowledge, opportunity identification, and solution development capabilities

Limitations

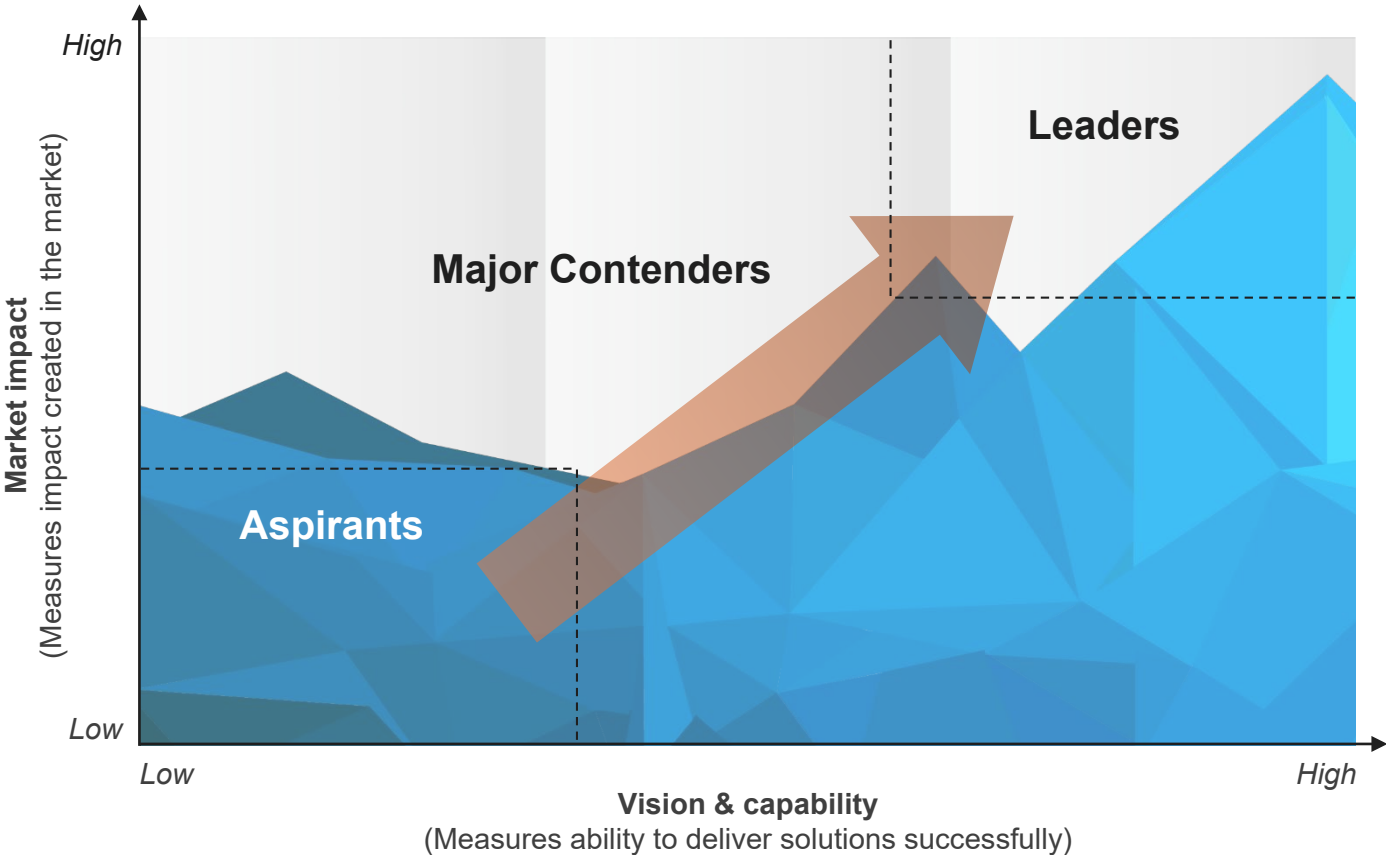
- While Capgemini has rich experience serving clients in North America and Europe, its client base in APAC, LATAM, and MEA is relatively small
- The majority of its clients are companies with more than US\$5 billion annual revenues; its client base in the midsize and small enterprise segments is limited
- While it assists clients in scaling up automation through frameworks and tools, the share of clients that have used this capability is comparatively low
- Although clients appreciate Capgemini’s professionalism and flexibility, they expect better planning and communication from the solution provider

Appendix

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



Everest Group PEAK Matrix

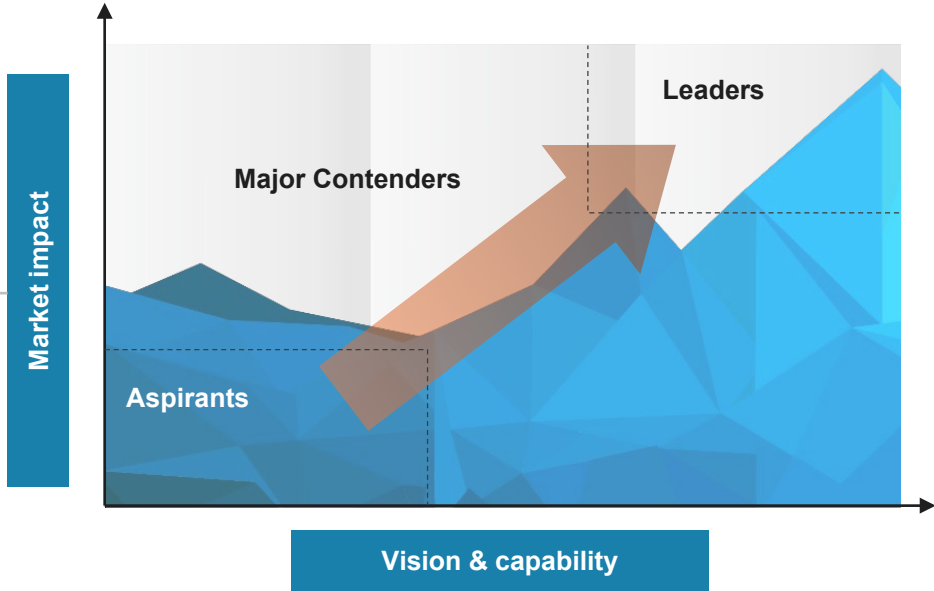




Solutions PEAK Matrix® evaluation dimensions

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



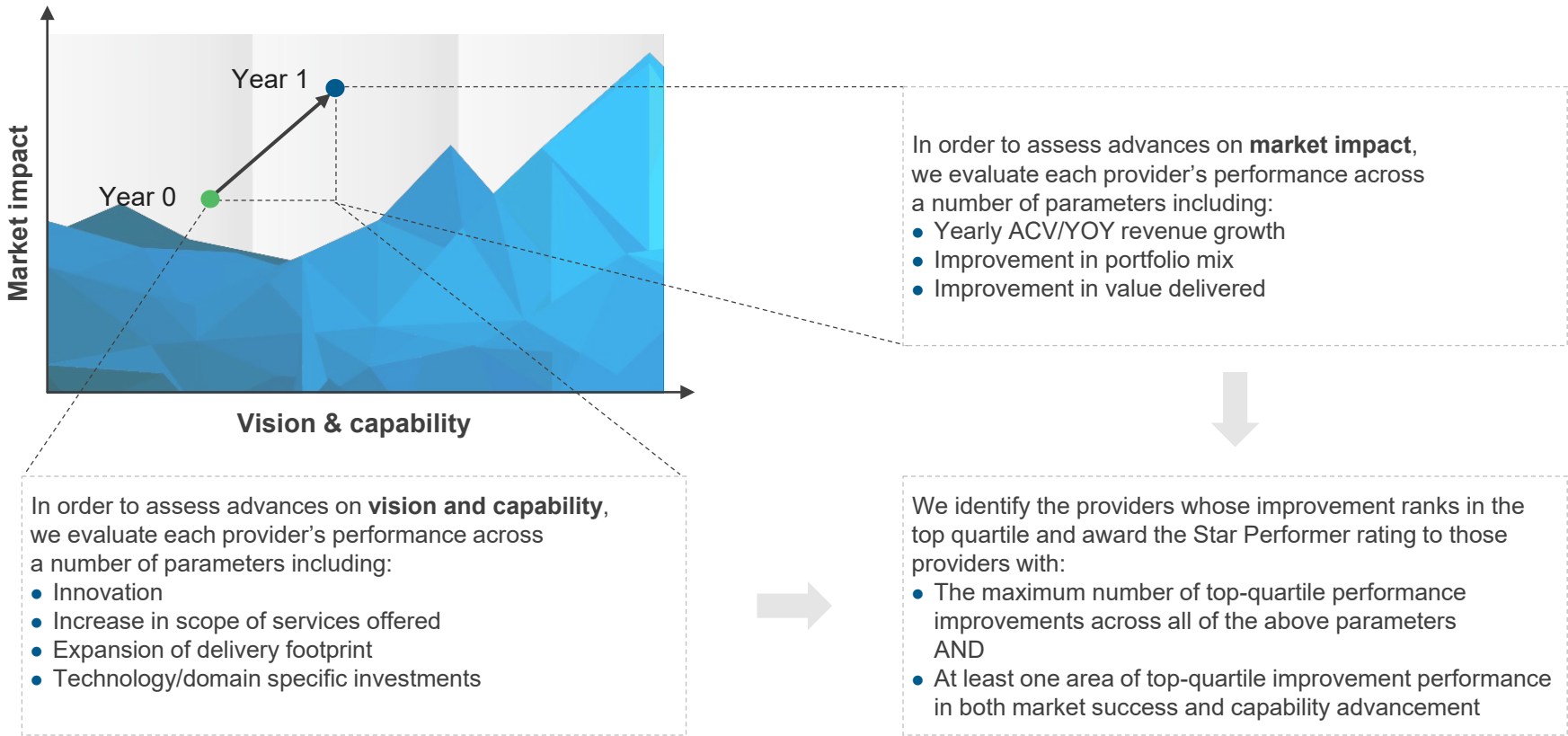
Measures ability to deliver solutions successfully. This is captured through five subdimensions

Vision and strategy	Technology capability	Services capability	Innovation and investments	Engagement and commercial model
Vision for the client and itself; future roadmap and strategy	Technical sophistication and breadth/depth across the technology suite	Effectiveness and breadth/depth of services portfolios across the services suite	Innovation and investment in the solution suite	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 adopts an unbiased and fact-based approach (leveraging provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information). In addition, these results are validated / fine-tuned 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 PEAK Matrix assessment are relevant to buyers and providers besides the “PEAK Matrix position”?

A PEAK Matrix position is only one aspect of Everest Group's overall assessment. In addition to assigning a “Leader”, “Major Contender,” or “Aspirant” title, Everest Group highlights the distinctive capabilities and unique attributes of all the PEAK Matrix providers assessed in its report. The detailed metric-level assessment and associated commentary is helpful for buyers in selecting particular providers/vendors for their specific requirements. It also helps providers/vendors showcase their strengths in specific areas

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

- Participation incentives for buyers include a summary of key findings from the PEAK Matrix assessment
- Participation incentives for providers/vendors include adequate representation and recognition of their capabilities/success in the market place, and a copy of their own “profile” that is published by Everest Group as part of the “compendium of PEAK Matrix providers” profiles

What is the process for a provider / technology vendor to leverage their PEAK Matrix positioning and/or “Star Performer” status ?

- Providers/vendors can use their PEAK Matrix positioning or “Star Performer” rating in multiple ways including:
 - Issue a press release declaring their positioning. See [citation policies](#)
 - Customized PEAK Matrix profile for circulation (with clients, prospects, etc.)
 - Quotes from Everest Group analysts could be disseminated to the media
 - Leverage PEAK Matrix 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 the designated POC at Everest Group.

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

PEAK Matrix assessments are designed to serve present and future needs of the enterprises. 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 as well as serve the future expectations of enterprises



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