Everest Group®

Everest Group PEAK Matrix® for Data and Analytics (D&A) Service Provider 2022

Focus on Capgemini
September 2022

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PEAK
MATRIX®

Background and scope of the research

Global macroeconomic conditions indicate the rising probability of a recession. Despite the resulting cost pressures, enterprise demand for D&A services is rising as enterprises realize that data-driven solutions focused on cost optimization and building competitive advantage are critical to tackle and survive the slowdown. In this regard, service providers can help enterprises in their digital transformation journey by formulating a vision for D&A, modernizing the D&A landscape, and providing the right talent and niche skill sets to achieve direct business outcomes.

In this research, Everest Group presents an assessment of 30 service providers featured on the D&A services PEAK Matrix®. Each provider profile provides a comprehensive picture of its services focus through a snapshot of its key strengths and limitations, as assessed by Everest Group. The assessment is based on Everest Group's annual RFI process for the calendar year 2022, interactions with leading D&A service providers, client reference checks, and an ongoing analysis of the D&A services market.

Everest Group has employed the following exclusion criterion before assessing service providers in the Data and Analytics (D&A) Services PEAK Matrix® Assessment 2022:

- Service provider should have a separate team and dedicated leadership for its D&A services
- With reference to the D&A services research scope, the service provider should have a meaningful presence across all D&A value chain segments
- The service provider must have substantial annual revenue from its D&A services practice

The full report includes the profiles of the following 30 leading D&A service providers featured on the D&A services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Cognizant, Deloitte, IBM, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Brillio, Coforge, DXC Technology, EY, HCL Technologies, Infogain, KPMG, Kyndryl, LTI, Mindtree, Mphasis, NTT DATA, Persistent Systems, PwC, Tech Mahindra, Virtusa, and Zensar
- **Aspirants:** Birlasoft, DMI, Stefanini, and UST

Scope of this report

Geography
Global

Providers
30 leading D&A service providers

Services
D&A services (refer to page 9 for scope of the research)

D&A services PEAK Matrix® characteristics

Leaders:

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

- Leaders have displayed a vision focused on driving business outcomes through D&A services for their customers
- They have made sustained strategic investments including acquisitions to bridge the portfolio gaps to achieve full services play
- They are at the forefront of innovation and driving change with thought leadership, partnerships, and internal investments in emerging themes such as MLOps, data observability, responsible AI, edge cloud computing, no-code/low-code solutions, data marketplaces, and data fabrics
- Leaders have invested heavily in acquisitions as well as building structured internal talent development programs to ensure the availability of skilled talent to solve complex problems. They have also focused on the breadth of skills, enabling full services play by developing a range of certification programs that help them stay ahead as technology evolves
- Leaders have developed a range of integrated platforms along with industry- and use case-specific accelerators to cut down the trial and run phase to achieve faster outcomes
- Domain focus and willingness to share risk and returns through value-based pricing models have further differentiated them in stakeholder partnerships

Major Contenders:

Atos, Brillio, Coforge, DXC Technology, EY, HCL Technologies, Infogain, KPMG, Kyndryl, LTI, Mindtree, Mphasis, NTT DATA, Persistent Systems, PwC, Tech Mahindra, Virtusa, and Zensar

- Major Contenders have shown high confidence in their sweet spots within the D&A stack. They have a strong base of satisfied clientele within these areas
- Major Contenders have the vision to develop full services play and are investing in talent development programs, acquisitions, IP building, and a partnership ecosystem to enable the same
- They need to supplement their vision and investments with effective communication of success on transformative end-to-end D&A deals to enhance their market perception

Aspirants:

Birlasoft, DMI, Stefanini, and UST

Aim to focus on creating solutions beyond niche areas; most engagements are based on flagship tools and solutions. The majority of investments are also directed toward upgrading and improving the features of these flagship solutions

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Everest Group PEAK Matrix®
Data and Analytics (D&A) Services PEAK Matrix® Assessment 2022 | Capgemini positioned as Leader and Star Performer

Everest Group Data and Analytics (D&A) Services PEAK Matrix® Assessment 2022[1,2,3]
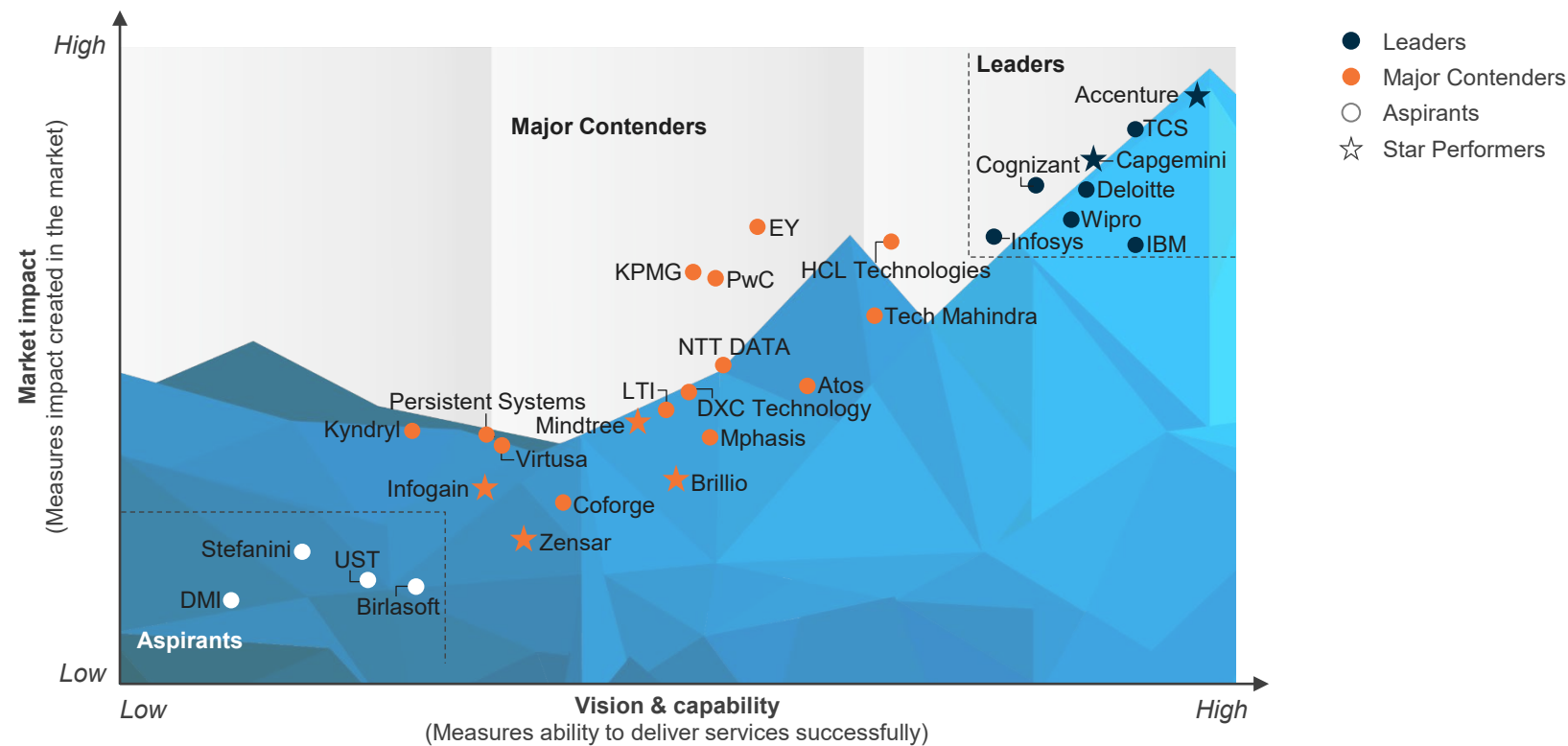
1 Assessments for DMI, Deloitte, DXC Technology, EY, IBM, Infosys, KPMG, NTT DATA, and PwC exclude service provider inputs on this study, and are based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of service providers' public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete

2 Assessments for Atos, Kyndryl, and Persistent Systems are based on partial inputs provided by service providers and are also based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of service providers' public disclosures, and interaction with buyers. For these companies, Everest Group's data for assessment may be less complete

3 Kyndryl and Persistent Systems are new entrants on the D&A PEAK Matrix and have therefore not been considered for the Star Performer title

Source: Everest Group (2022)

Capgemini | D&A services profile (page 1 of 5)
Overview

Company overview

Capgemini is a global leader in consulting, digital transformation, technology, and engineering services. The company is trusted by its clients to address the entire breadth of their business needs, from strategy and design to operations, fueled by the fast-evolving and innovative world of cloud, data, AI, connectivity, software, digital engineering, and platforms. The group reported global revenue of €18 billion in 2021. Capgemini operates in more than 50 countries across Asia Pacific, the Americas, and Europe.

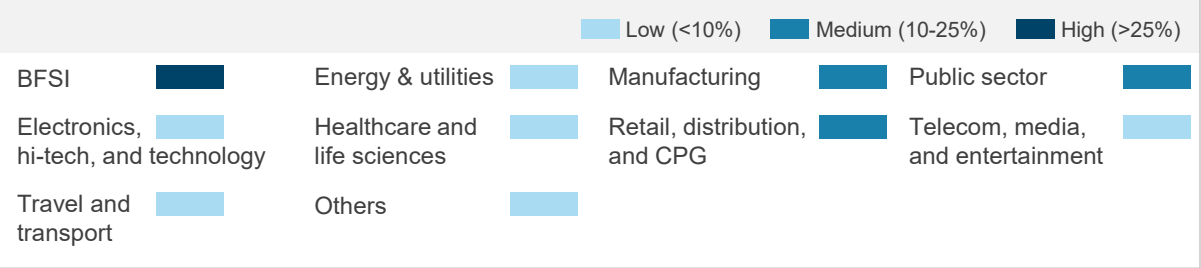|	
Website: www.capgemini.com	**Headquarters:** Paris, France

Key leaders

- Aiman Ezzat: Chief Executive Officer
- Zhiwei Jiang: Chief Executive Officer, Insights & Data GBL
- Anne-Laure THIEULLENT: Data, AI & Analytics Group Offer Leader
- Ron Tolido: Chief Innovation & Technology Officer, Insights & Data GBL

D&A practice overview

- Capgemini has over 30,000 professionals with D&A skills globally, covering the full data to insights life cycle. Its core D&A community is organized within the Insights & Data Global Business Line (I&D GBL). This global business line is responsible for pre-sales, solutioning, delivery, and capabilities development for D&A portfolio
- Company investments are focused on analytics & AI, IP solution offerings, raising cloud data transformation play, and accelerating automation and productization of data management services
- It brings in a blend of consulting, technical, and business/domain capabilities along with competitive and flexible delivery models to provide cost-effective solution for its customers

Adoption by industry

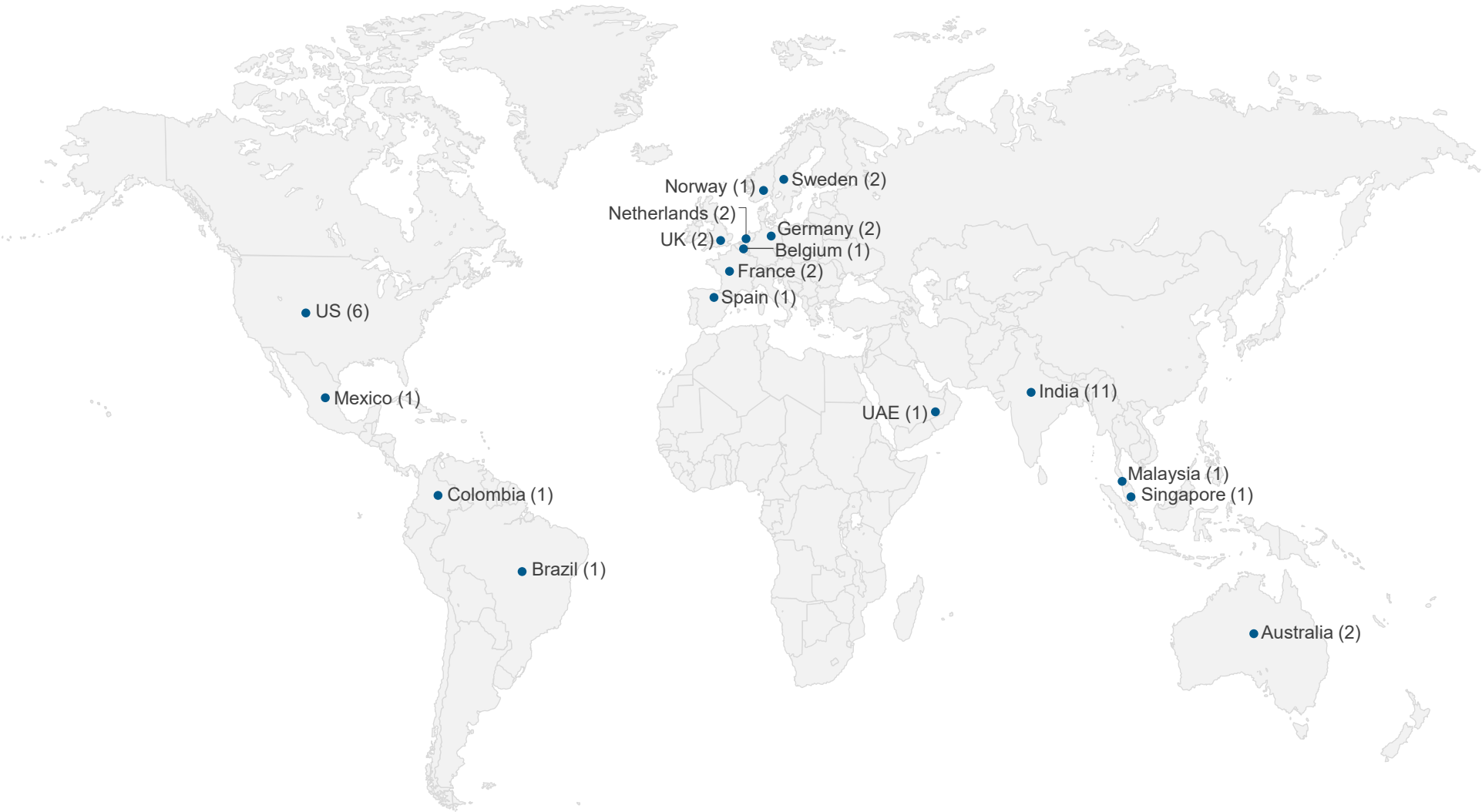Low (<10%) | Medium (10-25%) | High (>25%)

Industry	Level
BFSI	High (>25%)
Electronics, hi-tech, and technology	Low (<10%)
Travel and transport	Low (<10%)
Energy & utilities	Low (<10%)
Healthcare and life sciences	Low (<10%)
Others	Low (<10%)
Manufacturing	Medium (10-25%)
Retail, distribution, and CPG	Medium (10-25%)
Public sector	Medium (10-25%)
Telecom, media, and entertainment	Low (<10%)

D&A practice fact sheet	2020	2021
Revenue (US$ million)	2,630	3,155
Number of FTEs	25,350	30,275

Adoption by geography

Latin America (1%)

North America	EMEA	APAC
36%	56%	7%

Capgemini | D&A services profile (page 2 of 5)
Key delivery locations

Norway (1)
Sweden (2)
Netherlands (2)
Germany (2)
UK (2)
Belgium (1)
France (2)
Spain (1)
US (6)
Mexico (1)
India (11)
UAE (1)
Malaysia (1)
Singapore (1)
Colombia (1)
Brazil (1)
Australia (2)

Capgemini | D&A services profile (page 3 of 5)
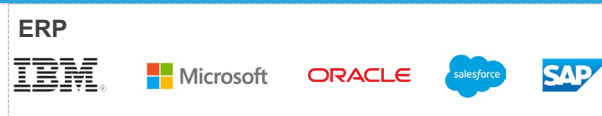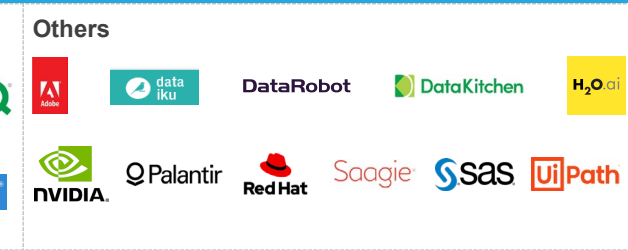## Solutions and partnerships

D&A IP overview
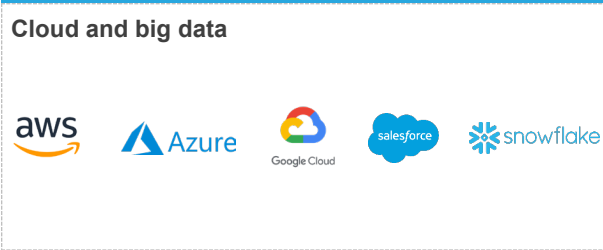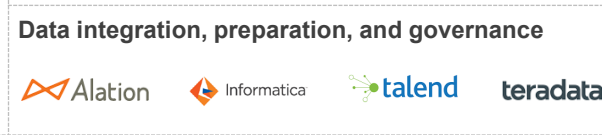
The key value propositions of Capgemini's IP and D&A portfolio are:
- 890 by Capgemini version 2.0: this is a suite of ready-to-use solutions addressing multiple sectors and domains that reduce the time-to-market for AI/analytics offerings. Available on any cloud, and with a single interface, it provides insights that deliver business outcomes at speed and scale
- Collaborative Data Ecosystem: the collaborative data-sharing concept can be used to shape cloud-based platforms that bring together data from a wide range of internal and external sources to power an integrated suite of ESG-related applications
- Data for net zero (sustainable IT): data for net zero is an initiative that helps organizations make the best of data to secure their net-zero transformations, seamlessly exploiting net-zero intelligence to monitor and report on their ESG commitments

Proprietary IP/solutions/frameworks/accelerators/tools developed internally to deliver D&A services

Solution name	Solution type	Year launched	Details
IDEA	Platform	2021	Industrialized Data & AI Engineering Accelerators (IDEA) allows clients to accelerate time-to-value and decrease costs of data & AI platforms. IDEA offers auto ML constructs, AI/ML framework and support.
Cognitive Document Processing	Platform	2020	Cognitive Document Processing is an integrated platform that makes it easy to acquire, process, and act upon a range of structured and unstructured information. It accepts digitized or handwritten client documents as inputs and uses cognitive automation technology to read and extract data.
Know your Customer Better 2.0	Product	2020	The product leverages computer vision, cognitive document processing, supervised learning, and external data bases to optimize customer onboarding process and build a more accurate risk profile of customers.

Key partnerships (logos)

Cloud and big data

ERP

Data integration, preparation, and governance

BI and visualization

Others

Capgemini | D&A services profile (page 4 of 5)
Investments and market success

Other investments to enhance D&A services capabilities, e.g., setting up of new delivery centers / CoEs / innovation labs, and trainings/certifications	
Development	**Details**
Centers of Excellence (CoE)	● AI & Sector CoEs: these centers build and manage AI-driven solutions that are integrated into legacy systems to help augment, assist, and automate the business processes ● Sustainability CoEs: service offerings range from business development and market intelligence to carbon impact accounting and management. The center consists of environmental experts from across the Group ISO 14001 providing customized support to clients
Talent	● Capgemini Data and AI academy: this learning initiative aims to equip employees from entities across Capgemini with the right skills to meet data and AI-related capabilities ● Automation Drive Academy & Library: the academy offers trainings on scripting languages and tools with three levels of certifications; foundation, practitioner, and specialist ● Millennial Garage: it is Capgemini's solution development lab that develops people engagement and IP solutions. It also acts as the engagement platform for its employees, enabling rapid onboarding
Innovation	● Applied insights foundry: it is a foundry of pre-built, reusable assets that accelerate global sector-specific deployments ● Capgemini Ventures: a € 90 million fund dedicated to investing in innovative start-ups in the areas of innovative technological solutions, future leaders of the software industry, and sustainable IT
Start-up incubation	Capgemini, in partnership with ISAI, launched a ~US$ 90 million growth fund for B2B start-ups and scaleups. The fund is dedicated to investing in the areas of innovative technological solutions, sustainable IT, and future leaders of the software industry
Acquisitions	● In 2021, acquired RXP Services, a provider of data and cloud solutions. The acquisition will enable further expansion of Capgemini's offerings in Australia and New Zealand ● In 2022, acquired Chappuis Halder & CIE, a global strategy and management consultancy firm specialized in Financial Services ● In 2022, acquired Rufus Leonard, a London-based brand design and experience agency. The acquisition will help to meet clients' demand for creativity, strategy, and design services and will enhance the Group's customer-first services in the UK

Recent D&A engagements (non-exhaustive)			
Client	**Year of signing**	**Geography**	**Engagement details**
The federal authority	Not disclosed	Germany	Designed a future-proof, big data architecture that is validated by proof of concept, to provide monthly register-based statistics of the German population census. This enabled development and modernization of administrative and statistical registers based on data-driven architecture.
A multinational utility company	Not disclosed	France	Designed a data advisory CoE for the client that included a full data service catalogue. Defined a specific partnership model that involved co-management and co-delivery, making Cognizant a key partner for data activity for the client.
A multinational financial services company	Not disclosed	US	Capgemini partnered with the bank to deliver a centralized data strategy and platform. Designed solution frameworks to automate E2E data processing and supported the enterprise in establishing a GDPR program structure. Also, implemented advanced analytical use cases encompassing areas, such as AI/ML, for use in Python and Splunk ITSI, with built-in machine learning models.

Capgemini | D&A services profile (page 5 of 5)
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	Scope of services offered	Innovation and investments	Delivery footprint	Overall
◕	◕	◔	◔	◔	◔	◕	◔	◔

Strengths

- Capgemini is differentiating itself in the market by building solutions for data sharing and monetization. It has focused on building external and internal data marketplaces for its clients through its 890 by Capgemini offering
- It has focused on strengthening its AI capabilities through an IP-led delivery approach in the following manner:
  - Capgemini has infused explainability and MLOps solutions in its flagship platforms to enable AI scaling
  - It has also invested in emerging AI themes including ethical AI, edge AI, and no-code / low-code AI solutions
- It is actively investing in acquisitions to expand its digital & D&A business in the Asia Pacific, especially the ANZ region in the following manner:
  - It acquired RXP Services to expand its operations in Australia (addition of 550+ FTEs), also expanding its relations with Salesforce, Microsoft, and ServiceNow
  - It acquired cloud transformation and digital services provider, Empired, to further expand its position in the Western Australian and New Zealand market

Limitations

- Although Capgemini has invested in data monetization and AI platforms and solutions, it lags peers when it comes to the client adoption and brand recall of its flagship AI platforms
- Capgemini is behind its peers when it comes to investments in hyperscaler partnerships. Some examples are as follows:
  - It lags peers in terms of investments in dedicated cloud business units across all hyperscalers
  - It is also behind when it comes to scaling its talent pool across hyperscalers in comparison with some of its peers
- Clients expect Capgemini to offer a strategic partnership in engagements and also expect it to co-innovate in engagements. Some referenced clients also mentioned that it lacks focus on bringing in new technologies or solutions

Appendix

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

Everest Group PEAK Matrix
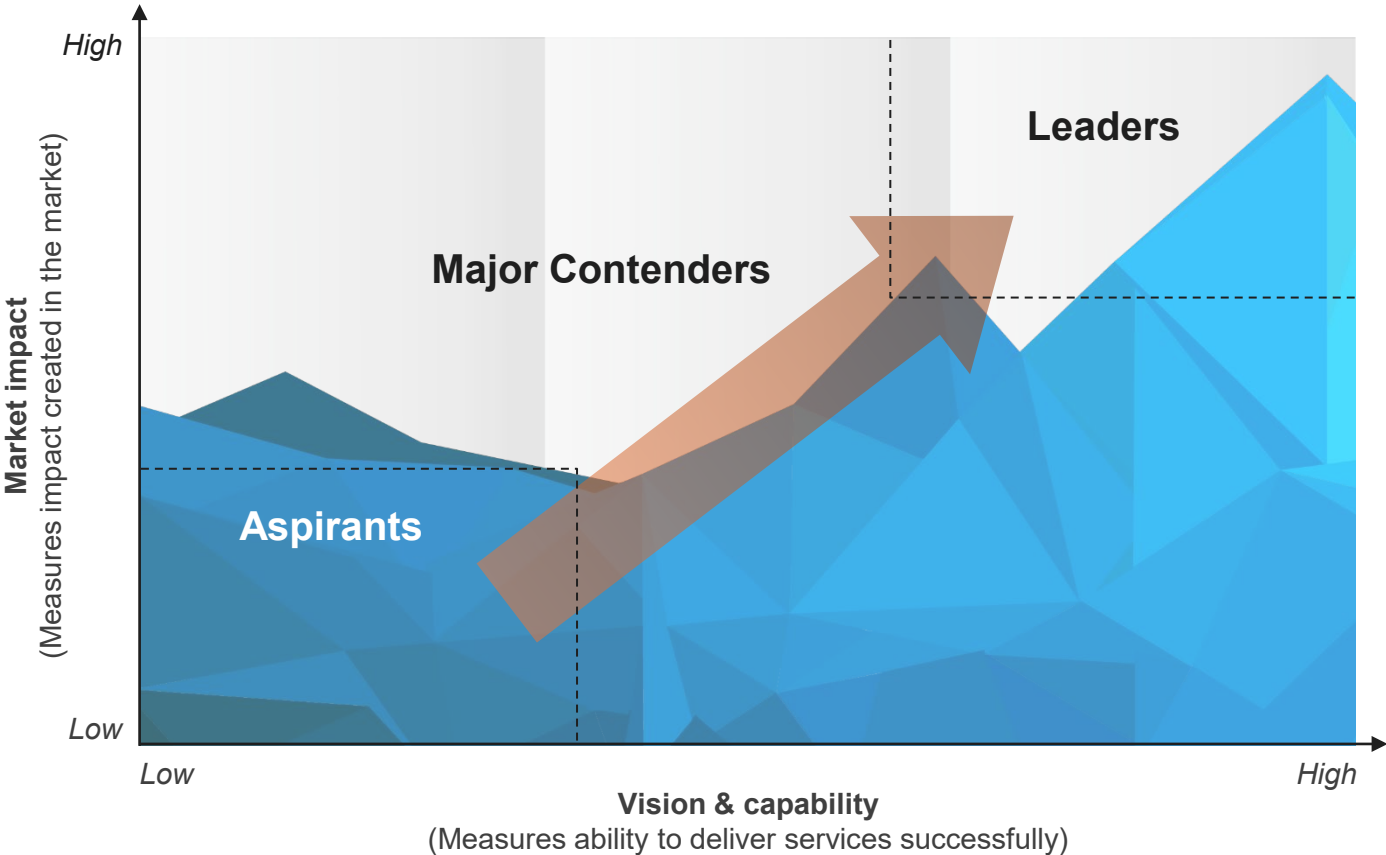
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market –
captured through three subdimensions
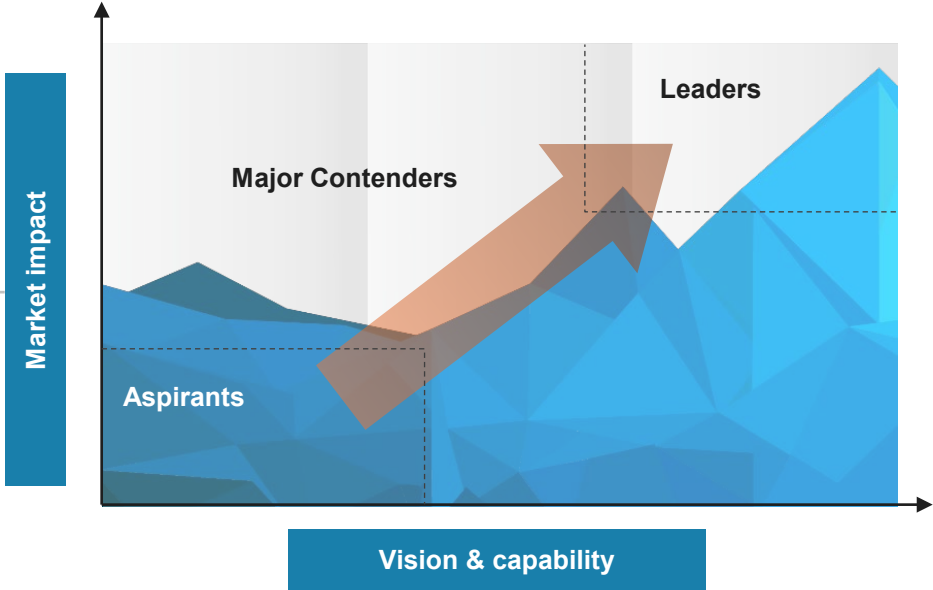
Market adoption

Number of clients, revenue base,
YoY growth, and deal value/volume

Portfolio mix

Diversity of client/revenue base across
geographies and type of engagements

Value delivered

Value delivered to the client based
on customer feedback and
transformational impact

Market impact

Leaders

Major Contenders

Aspirants

Vision & capability

Measures ability to deliver services successfully.
This is captured through four subdimensions

Vision and strategy

Vision for the client and itself; future
roadmap and strategy

Scope of services offered

Depth and breadth of services portfolio
across service subsegments/processes

Innovation and investments

Innovation and investment in the enabling
areas, e.g., technology IP, industry/domain
knowledge, innovative commercial
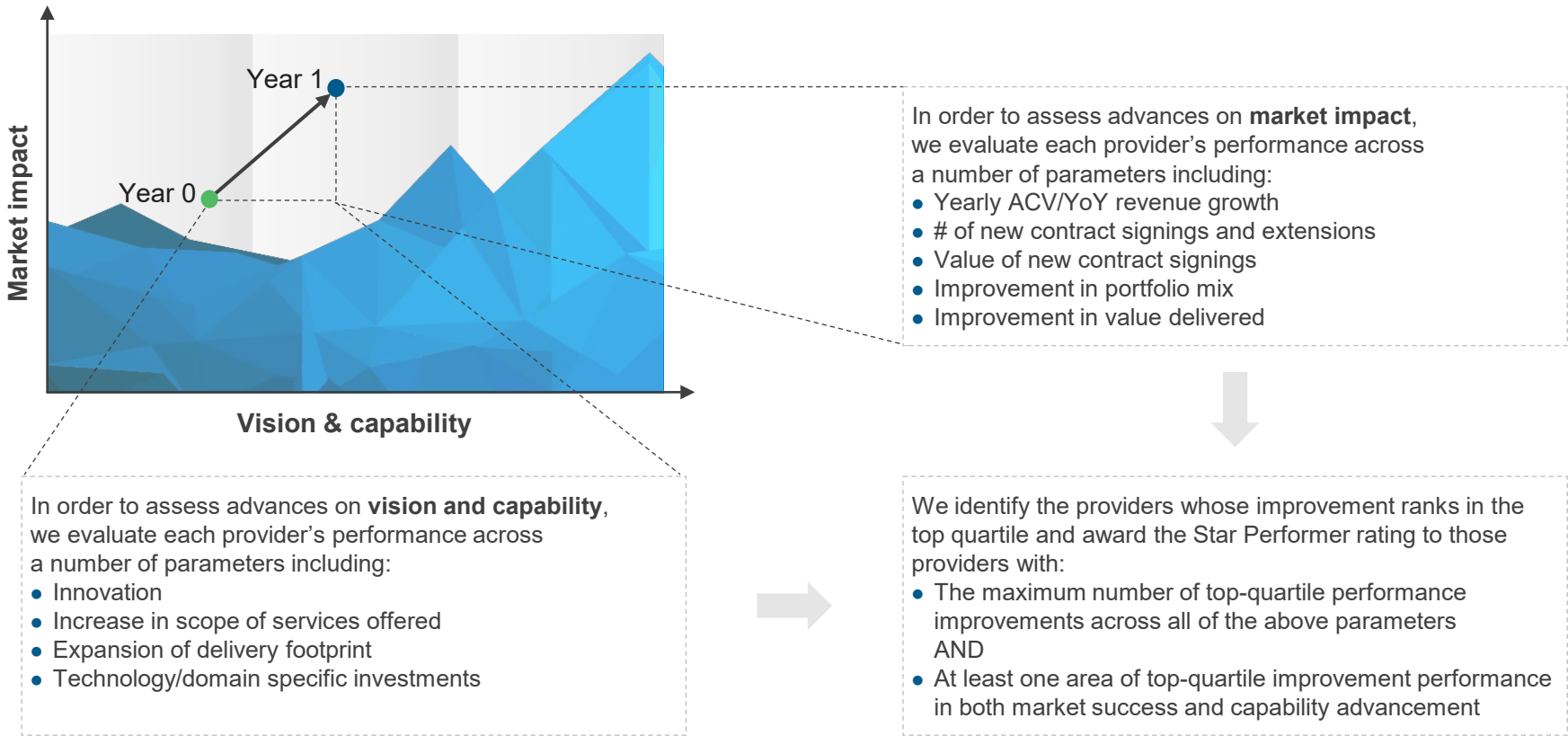constructs, alliances, M&A, etc.

Delivery footprint

Delivery footprint and global sourcing mix

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

In order to assess advances on **market impact**, we evaluate each provider's performance across a number of parameters including:
- Yearly ACV/YoY revenue growth
- # of new contract signings and extensions
- Value of new contract signings
- Improvement in portfolio mix
- Improvement in value delivered

In order to assess advances on **vision and capability**, we evaluate each provider's performance across a number of parameters including:
- Innovation
- Increase in scope of services offered
- Expansion of delivery footprint
- 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 Performers title relates to YoY performance for a given vendor 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

Everest Group®

With you on the journey

Everest Group is a research firm focused on strategic IT, business services, engineering services, and sourcing. Our research also covers the technologies that power those processes and functions and the related talent trends and strategies. Our clients include leading global companies, service and technology providers, and investors. Clients use our services to guide their journeys to maximize operational and financial performance, transform experiences, and realize high-impact business outcomes. Details and in-depth content are available at **www.everestgrp.com**.

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