

Everest Group PEAK Matrix[®] for Intelligent Process Automation (IPA) Solution Providers 2021

Focus on Capgemini
April 2021



Background of the research

Enterprises are facing unprecedented pressure to reduce costs, optimize operations, and increase business resilience, more so due to the ongoing COVID-19 crisis. Multiple digital elements are disrupting the status quo. Both on the demand as well as supply side, digital technologies, automation in particular, are becoming ubiquitous. Enterprises are expecting not only cost reduction, but also next-generation benefits from their relationships; and solutions providers have recognized the need to pivot quickly to a digital-powered model to provide those benefits to their buyers. One of the most potent digital levers enabling this transformation is Intelligent Process Automation (IPA).

Everest Group defines IPA as Intelligent Automation 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 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:

Capgemini, Cognizant, IBM, TCS, and Wipro

- Leaders continue to focus on building technology capabilities; expanding partner ecosystems; and developing packaged solutions, reusable assets, and accelerators across business processes to meet client requirements and improve speed of deployment
- With a dedicated vision to drive enterprise-wide intelligent automation initiatives, leaders leverage their superior consulting capabilities and fuel innovation through R&D, labs, and partnerships with start-ups and academic institutions

Major Contenders:

Atos, Datamatics, Digital Workforce, EXL, Genpact, HCL Technologies, Hexaware, Infosys, Mphasis, NTT DATA, Persistent Systems, PwC, RPATech, Softtek, Sopra Steria, SYKES Digital Services, Tech Mahindra, and UST

- Major Contenders trail leaders in terms of 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 RPA and cognitive automation capabilities. They have also come a long way in employing progressive commercial models in their engagements

Aspirants:

Accelirate, DigiBlu, Exela Technologies, and Robiquity

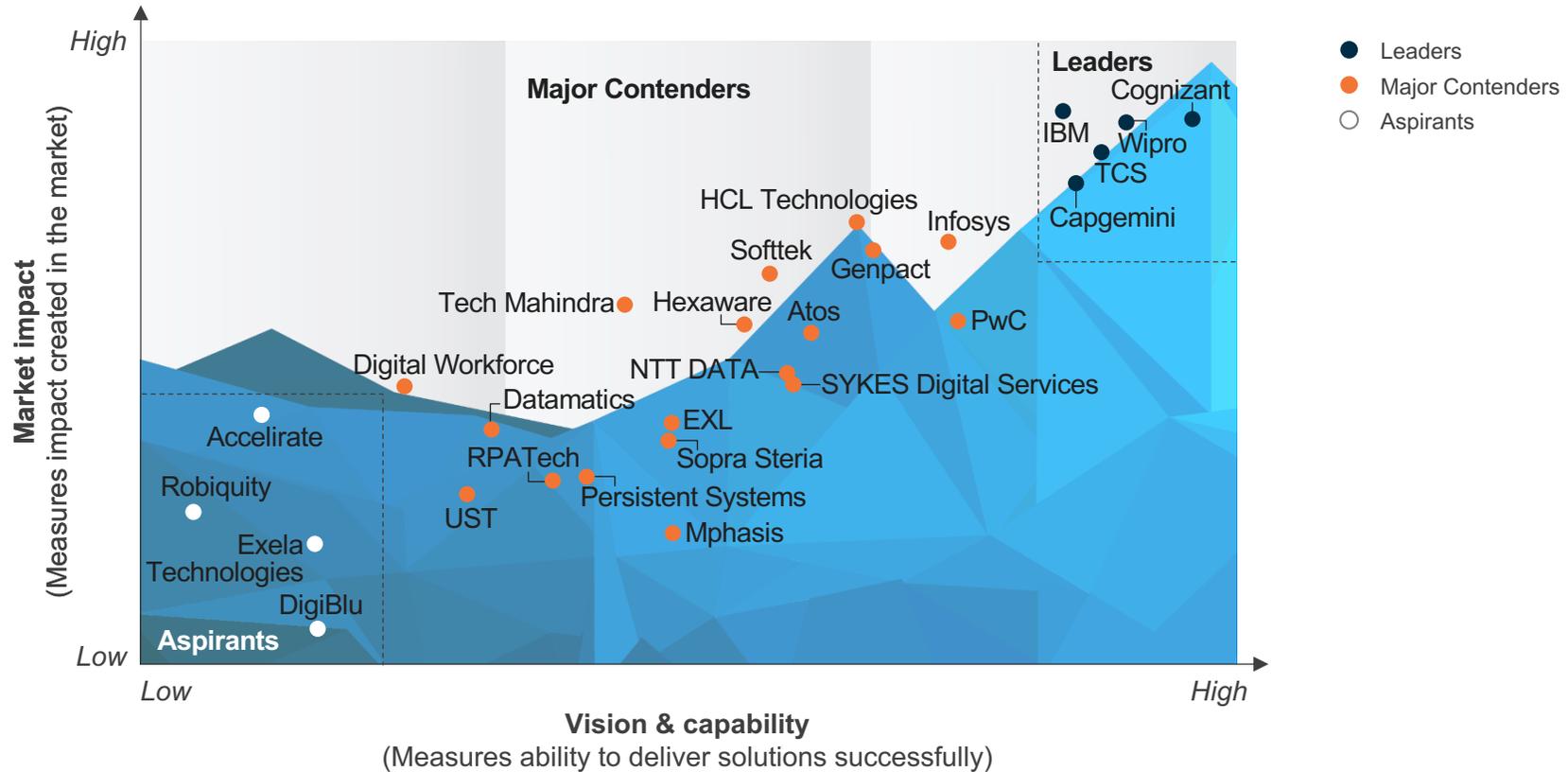
- While Aspirants are differentiated by their niche consulting capabilities and value delivered to clients in terms of proactively modifying their automation offerings to suit enterprise business needs, they need to supplement these with better technology innovations and greater push for market adoption
- 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 growth

Everest Group PEAK Matrix®

Intelligent Process Automation (IPA) Solutions PEAK Matrix® Assessment 2021 |

Capgemini positioned as Leader

Everest Group Intelligent Process Automation (IPA) Solutions PEAK Matrix® Assessment 2021



Source: Everest Group (2021)

Capgemini | IPA solutions profile (page 1 of 5)

Overview

Company mission/vision statement

Capgemini’s vision is to create value for its clients by removing friction from business operations using a digitally augmented (human + robot) workforce. With an increasing focus on as-a-service-based delivery model and infusion of AI, Capgemini seeks to reshape the technology and operational landscape to unlock value.

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

Key leaders

- **Sebastien Guibert:** Group IPA Offer Leader
- **Anne-Laure Thieullent:** Group AI & Analytics Leader

Key clients

IHG, Airbus, etc.

Adoption and capability overview

Number of clients: 309

Number of IPA FTEs: 4,300

Recent deals and announcements (not exhaustive)

- January 2021: Introduction of Digital Global Enterprise Model.AI (D-GEM.AI) to support global operation transformation programs with new advances in the AI space
- June 2020: Partnered with BlackLine, a software company, to enable and optimize its finance and accounting process using AI & RPA
- May 2020: Partnered with Celonis, a software company, to leverage its process mining capabilities to create a virtual representation of the underlying processes and identify opportunities for automation
- October 2019: Launched Millennial Garage, Capgemini’s solution development lab, to converge skill development, people engagement, and IP solution development related to automation and AI

Key locations with IPA FTEs

- North America (the US and Canada)
- Continental Europe (Poland, Romania, Nordics, the UK, France, and Germany)
- Asia Pacific (India and China)
- Latin America (Guatemala)

Commercial model

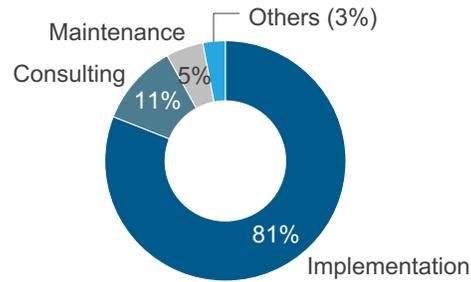
	Offered	Not offered
Input-/FTE-/T&M-based	Offered	Not offered
License-/IP-based	Offered	Not offered
Transaction-based	Offered	Not offered
Outcome-based	Offered	Not offered
Fixed price model	Not offered	Not offered

Capgemini | IPA solutions profile (page 2 of 5)

Capabilities

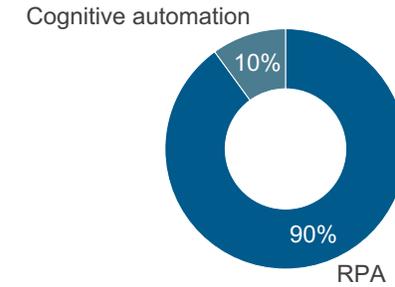
Split of IPA FTEs by scope of services

100% = 4,300

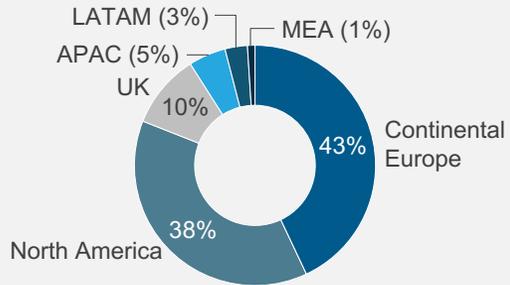


Split of IPA FTEs by automation type

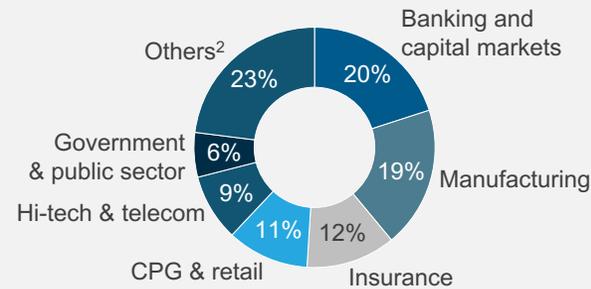
100% = 4,300



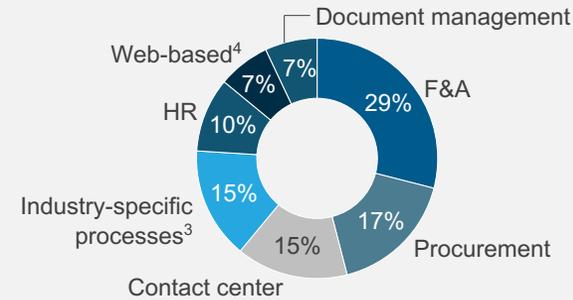
IPA revenue mix by buyer geography



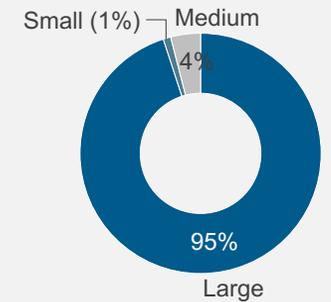
IPA revenue mix by buyer industry



IPA revenue mix by business function / process area



IPA revenue mix by buyer size¹



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

² Others in IPA revenue mix by buyer industry mainly include healthcare & pharma, travel & logistics, and media & entertainment

³ Industry-specific processes for IPA revenue mix by business function include banking, insurance, capital markets, healthcare, pharma, and utilities industry-specific processes

⁴ Web-based include web-based, e-commerce, or digital self-service transaction processing

Source: Everest Group (2021)

Capgemini | IPA solutions profile (page 3 of 5)

Solutions portfolio

Solutions	RPA	Intelligent Document Processing (IDP)	Intelligent Virtual Agents (IVA)	AI advisor tools	AI-based analytics tools	Classic process mining	Desktop Process Mining (DPM)	Workflow/ orchestration
Third-party solutions vendor	UiPath, Blue Prism, Automation Anywhere, Microsoft, WorkFusion, Pega, Kryon, and NICE	ABBYY, Kofax, UiPath, Blue Prism, Automation Anywhere, WorkFusion, Parascript, SAP Document Extraction, and Celaton	Microsoft, Google DialogFlow, IPsoft Amelia, Kore.ai, SAP Conversational AI, and IBM Watson Assistant	IBM Watson, Yseop, Pega, UiPath, Alteryx, and Dataiku	Microsoft Power Platform, IBM Cognos, IBM Watson, SAP Analytics Cloud, Salesforce, Dataiku, and KNIME	Celonis, Minit, ABBYY, UiPath, QPR, Kryon, and myInvenio	Celonis, ABBYY, UiPath, Kryon, and FortressIQ	Pega, Appian, Nintex, K2, and Trintech
Proprietary solutions offered	Capgemini Intelligent Automation Platform (CIAP)	Capgemini Document AI, Cognitive Document Processing (CDP), and Capgemini DeepExtract	ActionBots and HR Buddy	Capgemini AI Flip, Cash collection assistant, and Intelligent query manager	890 by Capgemini	Capgemini's Digital twin for operations	Capgemini PROMPT	

Top packaged solutions	Process area	Deployment options	Description	No. of clients
890 by Capgemini	Across multiple processes	On-premise and public cloud	A data, insights, and outcomes exchange. It is a cataloged platform and enterprise-wide AI marketplace that enables organizations to quickly gain access to key analytical and AI solutions and datasets from both within an organization, from multiple, carefully curated third-party providers, and from Capgemini.	10+
IDEA	Across multiple processes	On-premise and public cloud	Capgemini's set of industrialized data & AI engineering accelerators, which allows clients to accelerate time-to-value with data & AI platforms and decrease costs of data and AI platform setups.	12+
Document AI	Document management	On-premise and public cloud	An AI-based solution to identify, classify, and extract information from documents.	6+
Digital twin for operations	Across multiple processes	Public cloud and hybrid	It creates a virtual representation of a function using process mining to provide operational telemetry. The process mining data is used to identify bottlenecks and inefficiencies.	20+
Capgemini Intelligent Automation Platform (CIAP)	Across multiple processes	On-premise, cloud (private and public), and hybrid	A plug-and-play platform that enables enterprises to move from operations-focused, limited value Intelligent Automation (IA) initiatives to an enterprise-wide, automation-first approach, thereby enabling the deployment of more high-value projects.	50+

Capgemini | IPA solutions profile (page 4 of 5)

Everest Group assessment – Leader

Measure of capability: ● High ◐ Low

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 create value for its clients by providing a digitally augmented workforce at scale. It has increased its focus on data and AI engineering and launched the Perform AI offering, which is its portfolio of AI and analytics services
- It has a balanced portfolio, serving clients across industries such as BFSI, CPG & retail, healthcare, telecom, and manufacturing
- It has a strong partnership ecosystem consisting of both academic institutes and leading technology vendors across the IA landscape
- Capgemini’s Digital Twin for Operations integrates with third-party process mining solutions and creates virtual representation of the finance function to provide operational telemetry
- Its extensive services portfolio includes IPA maturity assessment, technology advisory, CoE setup, process discovery and analytics, IPA implementation-as-a-service, IPA operations-as-a-service, and change management

- Capgemini Intelligent Automation Platform (CIAP) is its platform solution that provides integrated Intelligent Automation into applications, and business & IT operations. It is offered as an automation-as-a-service platform that enables real-time robot monitoring, analytics, and control. It’s also includes a FastTrack Hub that contains reusable off-the-shelf assets and robots
- Its data, insights, and outcomes exchange, 890 by Capgemini, is a cataloged AI marketplace that provides enterprises access to a large set of analytics and AI solutions, accelerator tools, and datasets from both third-party providers and Capgemini
- It has a large focus on training and upskilling with various initiatives including an AI academy that provides certified courses to both internal and client employees
- Clients appreciate its customer service focus, maintenance services, ability to scale, and the ability to run the automation CoE

Capgemini | IPA solutions profile (page 5 of 5)

Everest Group assessment – Leader

Measure of capability:  High  Low

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
									

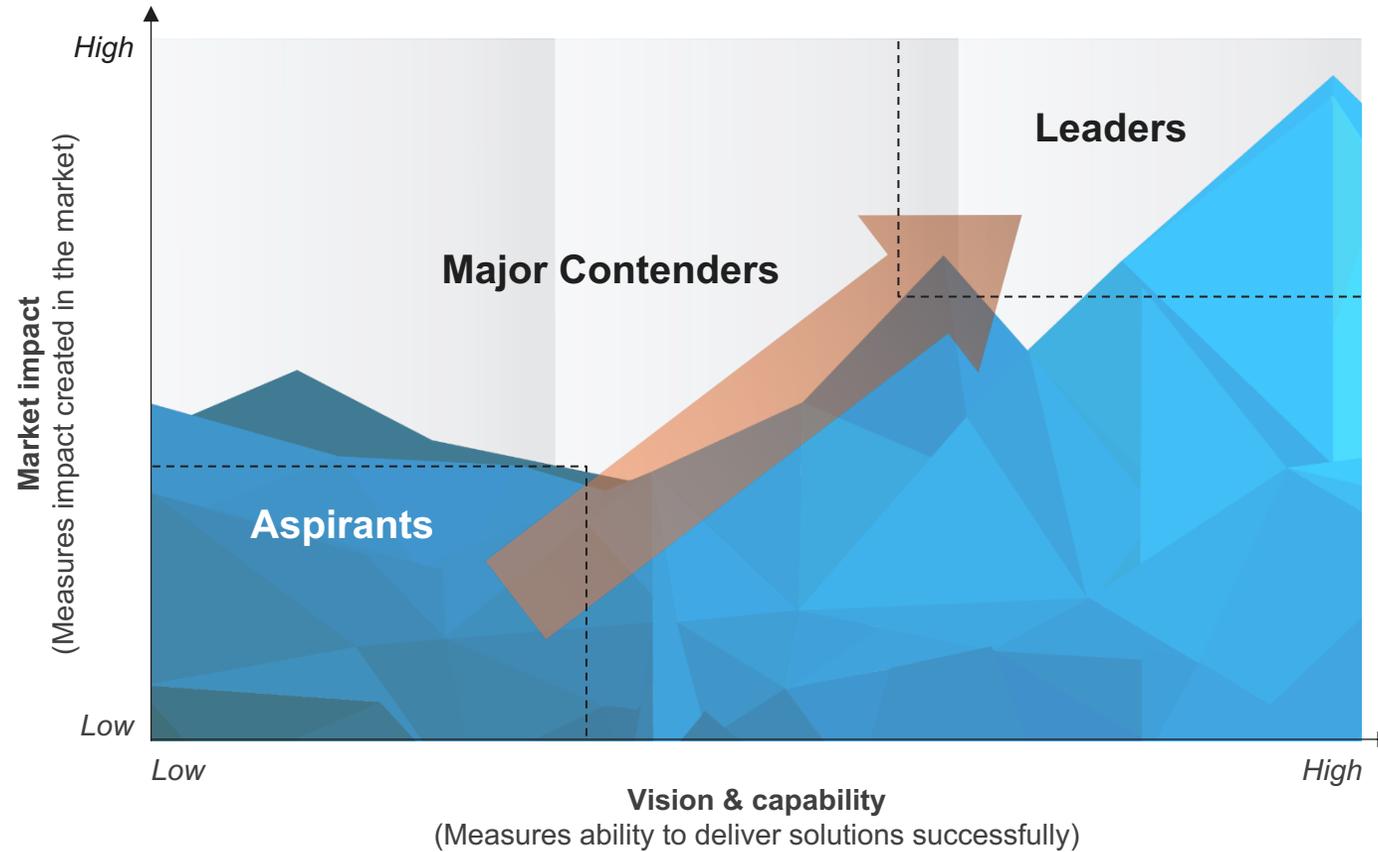
Limitations

- While it has rich experience serving clients in North America, the UK, and Continental Europe, its APAC client base is relatively small
 - Capgemini’s clientele primarily comprises large and mid-sized enterprises, and its ability to serve small enterprises and SMBs is relatively unproven
 - Its Capgemini Intelligent Automation Platform (CIAP) is currently more focused toward IT automation and the company is working toward adding more use cases aimed at business processes
 - While Capgemini has strong deployment accelerators with a large library of use cases and reusable scripts, offering advanced accelerators for robot migration, robot creation, and testing automation would further increase its value proposition
- While it offers the option of outcome-based pricing, adoption of this commercial model is low among its clients
 - Clients expect quicker delivery of solutions and more resources for implementation and maintenance
 - Clients also expect Capgemini to come up with more cognitive solution proposals to add greater value to their business

Appendix

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

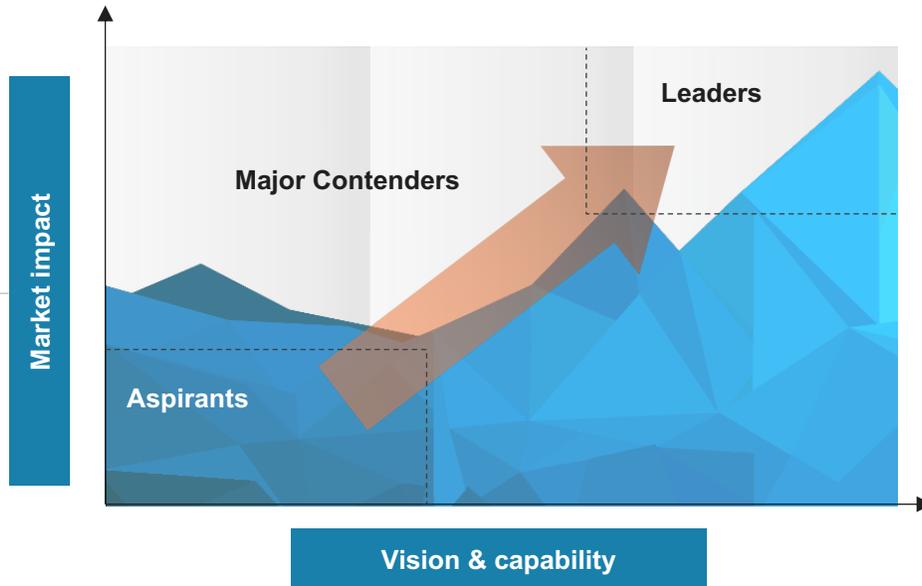
Everest Group PEAK Matrix



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

Glossary of key terms used in this report (page 1 of 2)

Artificial Intelligence (AI)	Ability of machines to use cognitive computing to mimic human intelligence, such as visual perception, speech recognition, decision-making, and language translation
BI	Technologies, applications, and practices for collection, integration, analysis, and presentation of business information
Business Process Management (BPM)	BPM solutions help to coordinate tasks and orchestrate the flow of information across disparately designed applications, databases, digital workers, and the human workforce. It includes capabilities of process design, execution (through workflows and orchestration of different BPS technology systems), and monitoring (through analytics)
Buyer	The company/entity that purchases outsourcing services from a provider of such services
Classic process mining	Classic process mining refers to the ability to leverage specialized algorithms to analyze process-related information that is captured in event logs generated by enterprise systems such as ERP, CRM, and SCM, to discover as-is processes, generate process maps, perform conformance check with pre-defined input reference process models, and generate insights for process improvement
Cognitive/smart automation	The ability of a system to learn how to interpret unstructured content, such as natural language, and use analytical capability to derive and present inferences in a pre-defined/structured fashion; for example, a system classifying the mood of a person into one of the pre-defined groups based on his/her tone and language
Computer vision	A technology that uses AI to enable automatic extraction, analysis, and understanding of useful information from digital images
Deep learning	A subfield of machine learning concerned with algorithms and inspired by the structure and function of the brain called artificial neural networks
Desktop Process Mining (DPM)	DPM refers to the ability to capture user's keyboard, mouse, and potentially other system-level activities performed simultaneously on various desktops to virtually reconstruct the processes and generate a process map capturing the different process variants
FTE	A way to measure a worker's productivity and/or involvement in a project. An FTE of 1.0 is equivalent to a full-time worker
Horizontal business processes	Those processes that are common across the various departments in an organization and are often not directly related to the key revenue-earning business, such as procurement, finance & accounting, and human resource management
IDP	Intelligent Document Processing is a software product or solution that captures data from documents (e.g., email, text, PDF, and scanned documents), categorizes, and extracts relevant data for further processing using AI technologies such as computer vision, OCR, Natural Language Processing (NLP), and machine/deep learning
Machine Learning (ML)	A type of artificial intelligence that provides computers with learning capabilities without explicit programming

Glossary of key terms used in this report (page 2 of 2)

Natural Language Processing (NLP)	A machine's ability to interpret human languages
Optical Character Recognition (OCR)	A technology within computer vision that involves the recognition of printed characters using computer software
POC	A realization of a certain method or idea in order to demonstrate its feasibility, or a demonstration in principle with the aim of verifying that some concept or theory has practical potential
ROI	Returns attained from an investment
RPA	RPA refers to a type of rules-based automation technology that helps automate repetitive tasks by mimicking a user's activities. It is non-invasive and typically interacts with a computer-centric task/process through the User Interface (UI) of the underlying software applications
RPA deployments	In-production or scaled-up deployments of RPA solutions
Semi-structured data	Semi-structured content is one that does not conform to the pre-defined structure of content, but nonetheless, contains tags / other markers to separate semantic elements and enforce hierarchies. In short, it has a self-describing structure. The placeholders of the content can be in varied sequences
Software-as-a-Service (SaaS)	SaaS is a software licensing and delivery model wherein the software is hosted centrally by a third-party provider and is made available to customers over the internet. It is also referred to as on-demand software
Structured data	Structured content is one that conforms to the pre-defined structure in terms of tags to separate semantic elements and enforce hierarchies of records and fields. Moreover, the placeholders for the content have a pre-defined sequence
Transaction-based pricing	Output-based pricing structure; priced per unit transaction with significant price differences between onshore and offshore
Usage-based pricing	Value-based pricing structure; pricing based on per-hour or per-minute of robot usage
Unstructured data	Unstructured content refers to information that either does not have a pre-defined data model or is not organized in a pre-defined manner. Unstructured information is typically text-heavy, but may contain data such as dates, numbers, and facts as well
Vertical-specific business processes	Vertical-specific business processes refer to processes that are specific to a department within an organization and are often directly related to the key revenue-earning business. Examples include lending process in case of the banking industry and claims processing in case of the insurance industry
Virtual agent	It is a computer-generated virtual character that can have a conversation with human customers and take decisions. Alternative term for chatbots or virtual assistants

FAQs

Does the PEAK Matrix® assessment incorporate any subjective criteria?

Everest Group's PEAK Matrix assessment adopts an unbiased and fact-based approach (leveraging service 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 service 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 service 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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