



Everest Group Intelligent Process Automation (IPA) Solutions PEAK Matrix® Assessment 2024

Focus on Capgemini

April 2024



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. With the advent of gen AI, the automation space is experiencing accelerated innovation to create new solutions and upgrade the existing ones to make them more personalized, adaptive, and efficient. 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, 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

Providers: 27 leading IPA solution providers

Solution: Intelligent Process Automation (IPA)

IPA solutions PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, Cognizant, IBM, PwC, and TCS

- Leaders maintain their emphasis on enhancing technological capabilities, focusing on areas such as gen AI, cognitive automation, and low-code/no-code, broadening their partner networks, and crafting reusable assets, accelerators, and packaged solutions for various business processes to satisfy client needs and expedite deployment
- They utilize their exceptional consulting, implementation, and maintenance capabilities, along with educational services, to tackle rising demands such as responsible AI, ensuring data privacy and IP protection, change management, ensuring sustainability, and promoting enterprise-wide intelligent automation efforts

Major Contenders

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

- Major Contenders are gaining ground on Leaders in IA adoption, investing in innovation, and expanding their solution range across processes and geographies. They have adapted to changing market needs, advancing in cognitive automation with as-a-Service (aaS) models, and have made progress in offering dynamic engagement models and enhancing Centers of Excellence (CoEs) in client environments
- They continue to make significant strides in terms of gen AI and low-code/no-code technologies, and are distinguished by their extensive services capability, but still have gaps to bridge in terms of market reach and breadth of offerings

Aspirants

Digital Workforce, Exela Technologies, Reveal Group, and Visionet

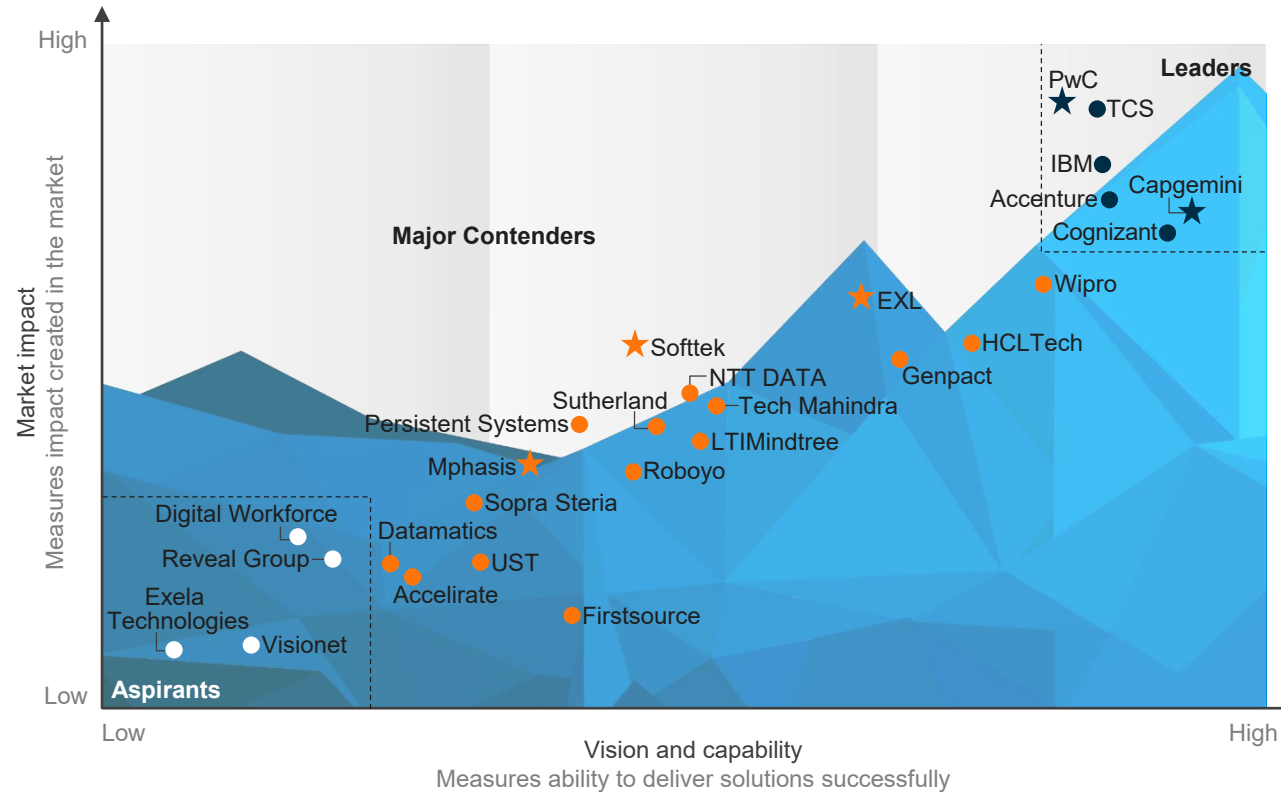
- Aspirants are setting themselves apart with specialized consulting services and customizing their automation solutions to align with specific enterprise requirements. Yet, to approach the effectiveness of Leaders and Major Contenders, they must integrate advanced technological innovations and strive for broader market adoption
- Aspirants often experience risk due to their focus on clients within narrow geographies or sectors. To catch up with Leaders and Major Contenders, they need to diversify their services across various business functions, industries, and geographies to stimulate revenue growth in the competitive IPA market

Everest Group PEAK Matrix®

Intelligent Process Automation (IPA) Solutions PEAK Matrix® Assessment 2024 | Capgemini is positioned as a Leader and a Star Performer

Everest Group Intelligent Process Automation (IPA) Solutions PEAK Matrix® Assessment 2024¹

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



¹ Assessment for Accelirate, Digital Workforce, Exela Technologies, IBM, NTT DATA, Tech Mahindra, and Wipro 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 (2024)

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Overview

Company overview

Capgemini's vision is to infuse Triple-A (Artificial Intelligence (AI), Analytics, and Automation) at the heart of every business process transformation. It understands dynamic market demand and represents an outcome-focused approach, offering a wide range of sustainable operations. By leveraging assets and frameworks around AI, process analytics, and IA, Capgemini promises to deliver 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
- Lalitha Kompella: Global Head of Intelligent Automation Practice (and US)
- Balaji CS Suryanarayana: IPA Senior Director, Extended Europe
- Sebastien Guibert: Group Offer Leader of Intelligent Process Automation Portfolio of Services
- Marek A. Sowa: Global IPA Offering and Innovation Head, Intelligent Process Automation

Recent deals and announcements (not exhaustive)

- **2024:** announced a new alliance partnership agreement with Mistral AI to accelerate the evolution toward more accessible and cost-effective generative AI implementation at scale
- **2024:** announced the signing of a multi-year strategic collaboration agreement with AWS to enable broad enterprise generative AI adoption
- **2024:** announced the launch of commercial activities of Bleu, a jointly created company with Orange. Bleu is created with the aim of meeting the specific cloud needs of the French State, public agencies, hospitals, etc.
- **2023:** received seven, a record number of AWS 2023 partner of the year awards, including AI/ML and Global Partner of the Year award
- **2023:** appointed Nive Bhagat as group CFO for Capgemini, effective January 1, 2024; she will be succeeding Carole Ferrand who has held the position since 2018

Key clients

Not disclosed

● Not offered ● 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)

Key locations with IPA FTEs

North America	Continental Europe and the UK	Asia Pacific
US and Canada	Poland, Romania, Nordic countries, UK, France, and Germany	India and China
Latin America	Middle East & Africa	
Guatemala		

Adoption and capability overview

Number of clients: 350+

Number of IPA FTEs: 7,000+

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Capabilities

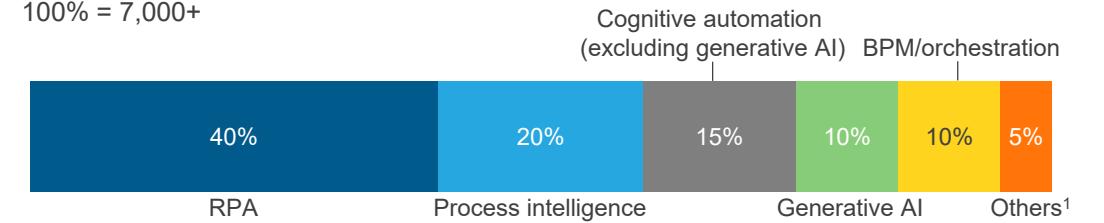
Split of IPA FTEs by scope of services

100% = 7,000+

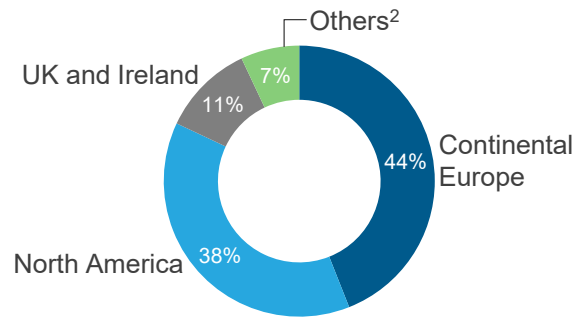


Split of IPA FTEs by automation type

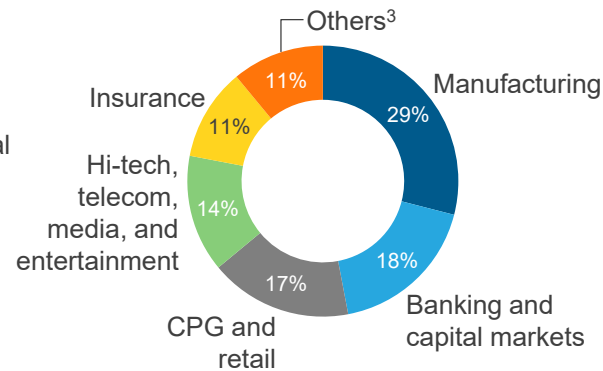
100% = 7,000+



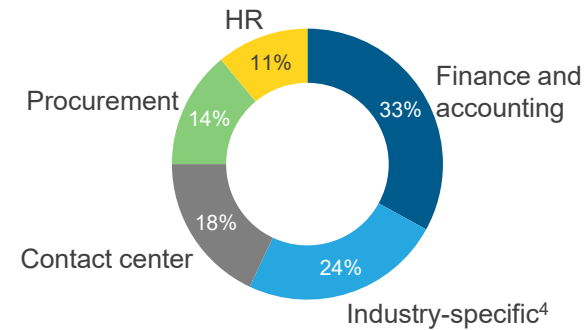
IPA revenue mix by buyer geography



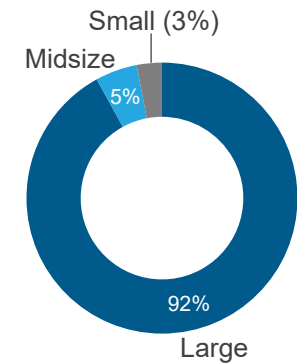
IPA revenue mix by buyer industry



IPA revenue mix by business function / process area



IPA revenue mix by buyer size⁵



¹ Others include advanced analytics FTEs

² Others include APAC (except ANZ), ANZ, Latin America, and MEA

³ Others include healthcare and life sciences, energy & utilities, government and public sector, and travel and logistics industries

⁴ Industry-specific processes for IPA revenue mix by business function include banking and capital markets, insurance, life sciences, CPG and retail, manufacturing, and energy and utilities industry-specific processes

⁵ 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 (2024)

Capgemini profile (page 3 of 6)

Solutions portfolio

Solutions	RPA	IDP	Conversational AI	Generative AI	AI-based analytics and advisor tools	Process mining	Task mining / Digital interactions intelligence	Process Orchestration
Third-party solutions	UiPath, SS&C Blue Prism, Automation Anywhere, Microsoft, WorkFusion, Pega, Nintex, IBM, NICE, and SAP	ABBYY, Tungsten Automation, UiPath, SS&C Blue Prism, Automation Anywhere, WorkFusion, Parascript, SAP, Microsoft, Celaton, and AYR.AI	Microsoft, Google, Amelia, Kore.ai, SAP, IBM, Rasa, and SoundHound	Amazon, Google, and Microsoft		Celonis, Microsoft, ABBYY, UiPath, QPR, IBM, SAP, and BusinessOptix	Celonis, ABBYY, UiPath, Nintex, SS&C Blue Prism, Microsoft, Soroco, and KYP.AI	Pega, Appian, Nintex, Trintech, ServiceNow, SS&C Blue Prism, Workday, Salesforce, and Microsoft
Proprietary solutions	Capgemini Intelligent Automation Platform (CIAP) / Enterprise Automation Framework	Capgemini Document AI, Cognitive Document Processing (CDP), Capgemini DeepExtract, IPA Document Understanding Toolkit (IPA Verse), Language Dependency Reduction for Documents, and PII removal for Documents	Central Management Application, ActionBots, AIMiLi0, and CHIP	Gen AI strategy, Custom gen AI for enterprise, Gen AI for customer experience, and Gen AI for software engineering	Digital Acceleration Navigator (DAN) and AI advisory package	Capgemini's Digital Twin for Operations	Capgemini PROMPT	CategorizeAI and IPA Intelligent Orchestrator

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Solutions portfolio

Top packaged solutions	Process area	Deployment options	Description	No. of clients
RAISE (Reliable AI Solutions Engineering)	Across multiple processes	On-premise and cloud (public and private)	A platform designed to enable clients to experiment value and automation cases and industrialize custom generative AI projects. It includes modules such as an experimentation platform, FMOps, generative AI guardrails, reusable solution components, and implementation of LLMs. It aims to address three critical dimensions of generative AI: cost, scale, and trust	Not disclosed
Capgemini IDEA	Across multiple processes	On-premise and cloud (public and private)	A set of industrialized data and AI engineering accelerators, leveraging DataOps, DevOps, and MLOps features, allowing clients to accelerate time-to-value and decrease setup cost with data and AI platforms	50
Capgemini Digital Twin for Operations	Across multiple processes	On-premise and cloud (public and private)	A solution that utilizes a blend of process mining, task mining, and data mining techniques to detect bottlenecks and inefficiencies within a process, and constructs a digital twin of the business process to simulate different business scenarios	30
Key orchestration platforms	Description		Independent licensing / included as part of service delivery	
Enterprise Automation Fabric	An 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		Included as part of service delivery	









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Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact

Vision and 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 goal is to help organizations grow through a focus on the data-driven and frictionless enterprise. It is developing a platform-based approach to move clients toward large-scale deployments and deep integration within existing technological and business landscape. Additionally, it is investing significantly in expanding its generative AI capabilities. It has created a Generative AI Lab to research the most relevant use cases and collaborations in generative AI for its clients and create internal readiness
- It has good consulting frameworks and service offerings around generative AI, which include copilot, risk mitigation through AI controls, data extraction from unstructured text documents, and custom generative AI assistants fine-tuned with enterprise proprietary data. Additionally, it offers NextGen MLOps as part of its services portfolio
- It offers a three-layered AI governance framework that ensures contextual adherence to regulations and ethical principles, alignment with organizational strategy and values, and incorporation of ethical AI into operational design across data, models, and systems
- Its Enterprise Automation Fabric is a unified IAaaS platform that enables real-time bot deployment, monitoring, AIOps integration, analytics, and controls. It has a built-in FastTrack Hub that contains reusable, off-the-shelf assets and bots to deliver AI-infused economies of scale in every deployment
- It offers a range of solutions focused on sustainability such as ESG Lens, Sustainability Data Hub, and Carbon Reporting and Management. These solutions help enterprises design and operate a data-driven path and navigate a seamless decarbonization journey to ensure organizational resilience across the corporate value chain
- Buyers appreciate the cost-effectiveness of its solutions, owing to its focus on delivering value-driven offerings
- Buyers have expressed their satisfaction with Capgemini’s implementation services as well as its adept talent management capabilities









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Everest Group assessment – Leader and Star Performer

Measure of capability:  Low  High

Market impact

Vision and capability

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

Limitations

- Capgemini’s clientele primarily comprises large enterprises with more than US\$5 billion revenue; it has limited experience in serving small and midsize enterprises
- Although it offers frameworks for scaling up, its experience in deploying IPA for a wide range of process areas within a client organization is limited
- Although it offers advanced outcome-based pricing model to clients, the adoption level is relatively lower compared to its peers
- Clients expect Capgemini to adopt a more strategic approach and be proactive in proposing new technologies and solutions
- Clients have also highlighted the need for better coordination among Capgemini’s internal teams and demonstrating greater ownership in expanding their business needs

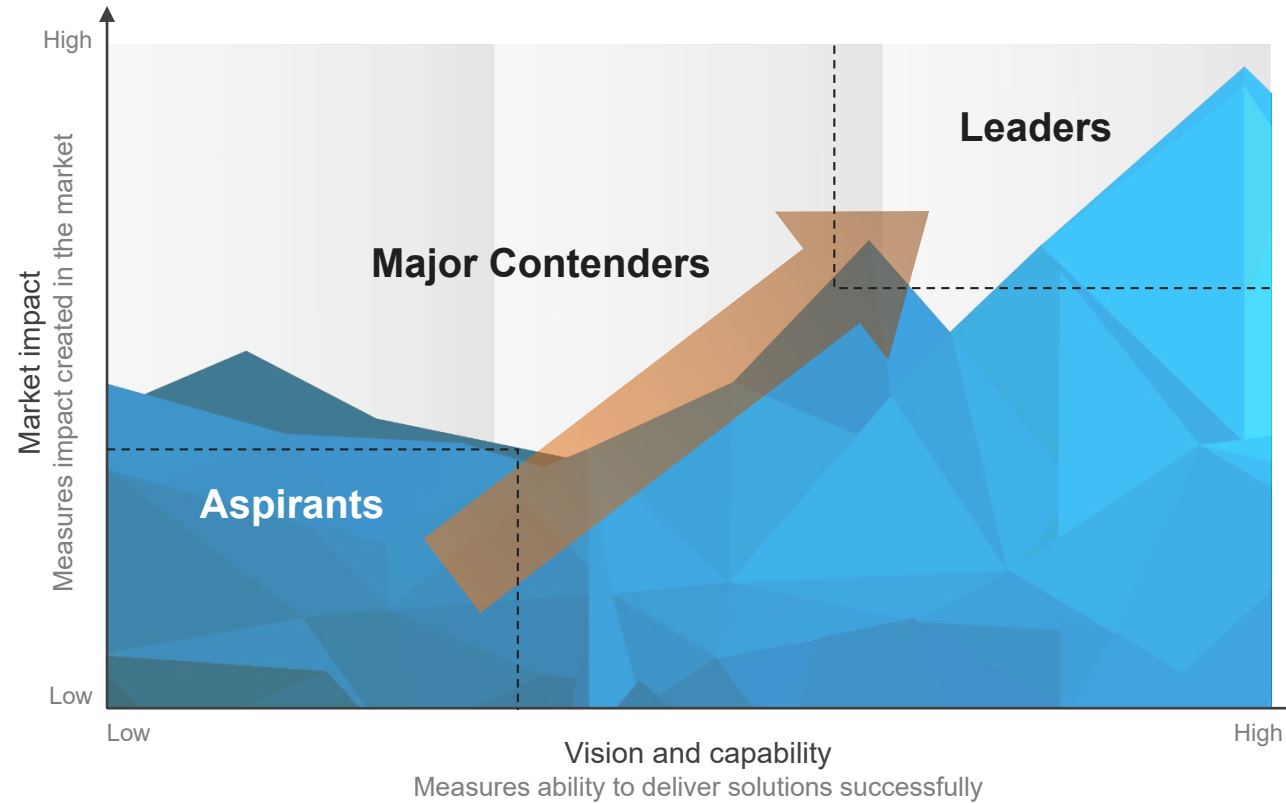
Appendix

PEAK Matrix framework

FAQs

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

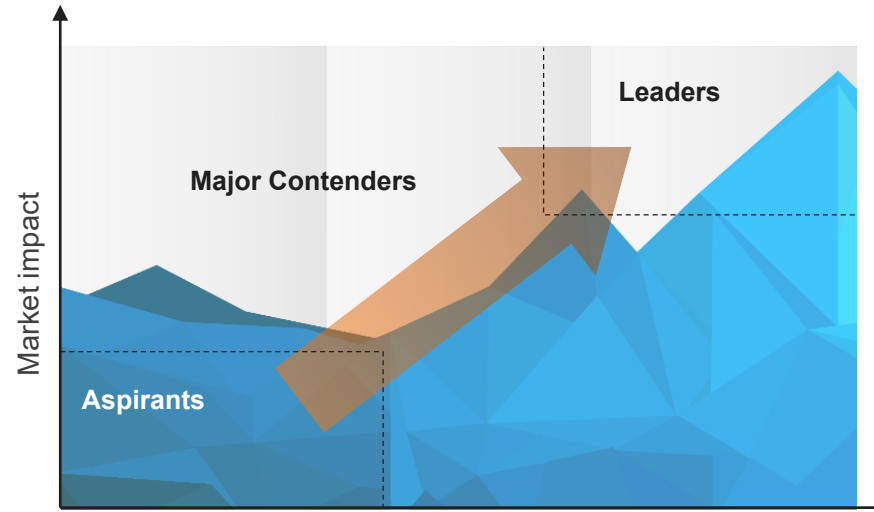
Size and growth of deployments across the solution portfolio

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



Vision and capability

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

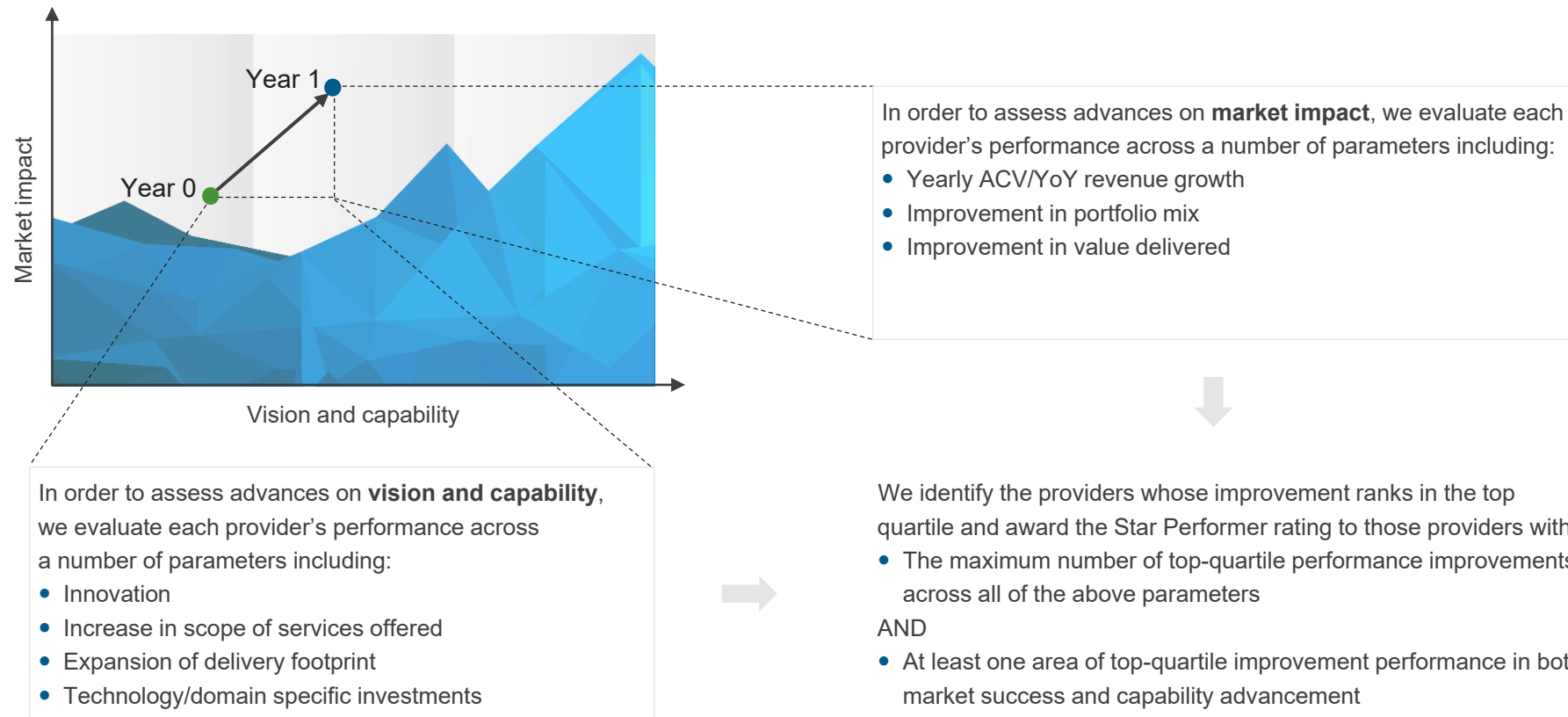
Engagement and commercial model

Progressiveness, effectiveness, and flexibility of engagement and commercial models

Everest Group confers the Star Performer 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 Performer 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

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: 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.

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

A: 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.

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

A: 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.

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

A: 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

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

A: 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

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

A: 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.

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