iSG Provider Lens™

Next-Gen ADM Services

A research report comparing provider strengths, challenges and competitive differentiators
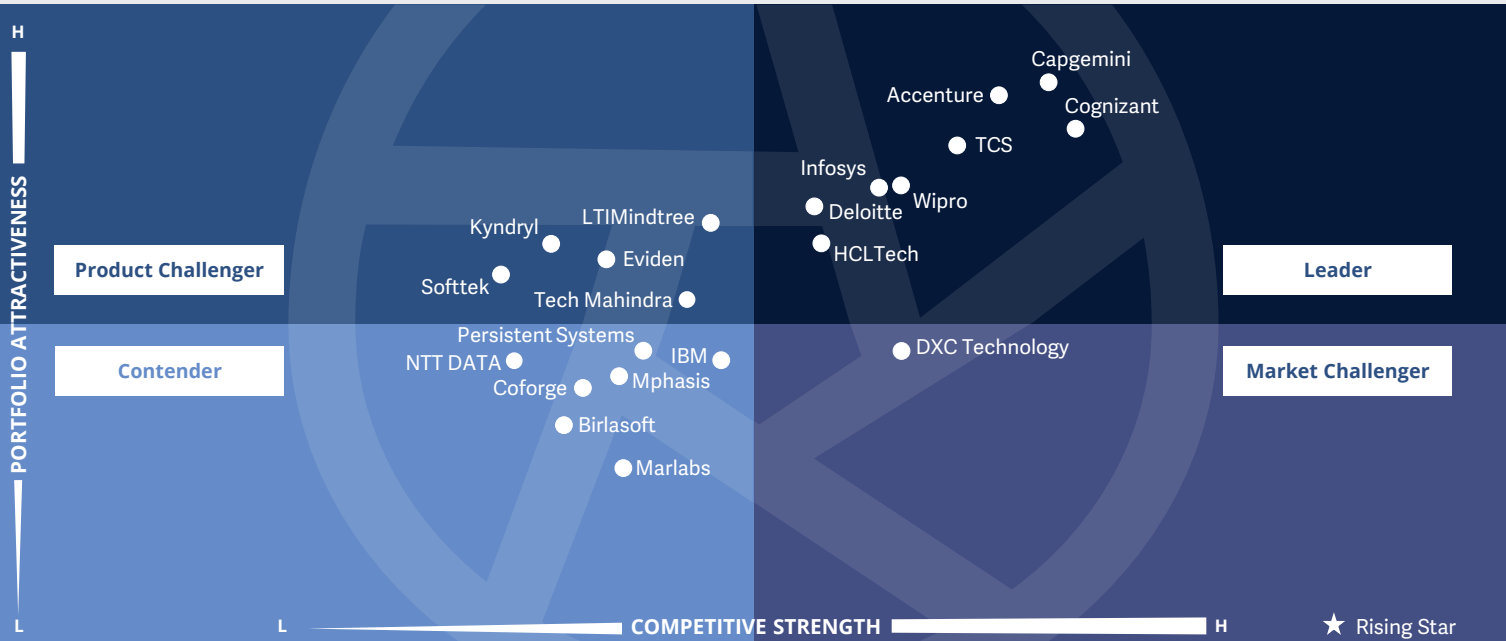
Customized report courtesy of:

Capgemini

ISG Provider Lens™

Source: ISG RESEARCH

Next-Gen ADM Services
Agile Application Development Outsourcing

U.S. 2023

PORTFOLIO ATTRACTIVENESS

H

L

Product Challenger

Contender

Leader

Market Challenger

Kyndryl
LTIMindtree
Eviden
Softtek
Tech Mahindra
Persistent Systems
NTT DATA
IBM
Coforge
Mphasis
Birlasoft
Marlabs

Infosys
Deloitte
Wipro
HCLTech

Accenture
Capgemini
Cognizant
TCS

DXC Technology

COMPETITIVE STRENGTH

L — H

★ Rising Star

This quadrant assesses **service providers that offer ADM expertise** using different technologies, spanning the complete application development and management landscape and most industry verticals.

Akhila Harinarayan

Capgemini

Leader

"Capgemini has a robust ADM practice with experienced personnel to deliver complex, large-scale applications for its clients with unique requirements."

Akhila Harinarayan

Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 359,600 employees worldwide. In FY22 the company generated €21.9 billion in revenue, with Applications and Technology as its largest segment. Capgemini offers its ADMnext framework for application development and maintenance. Capgemini also offers proprietary capabilities, including EAF (Enterprise Automation Fabric) and eAPM (economic Application Portfolio Management), that leverage automation to enable clients to drive greater value through targeted tech debt reduction, cloud migration initiatives and reduced operational effort.

Strengths

Low-code (LC), no-code (NC) platforms: Capgemini has employed skilled personnel in various LC/NC platforms and citizen development programs globally, with the largest teams focused on Salesforce, Pega and ServiceNow. The company also has resource teams skilled in Microsoft PowerApps, Mendix, Appian and OutSystems. The Capgemini Invent unit possesses capabilities that support the LC/NC platform selection process and designing and implementing citizen developer programs.

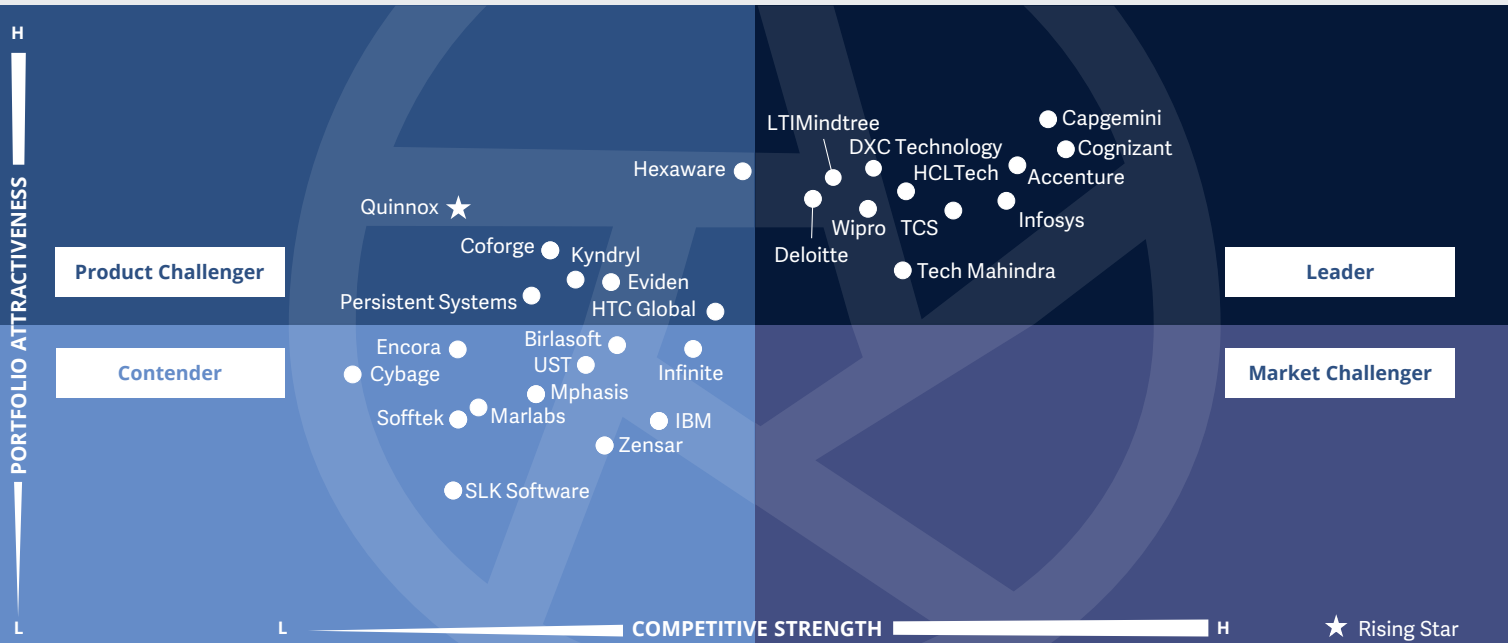**Talent, innovation, sustainability and ADM:** Capgemini focuses on talent, innovation and sustainability, internally and for its clients, and sees ADM as a key enabler of sustainability. The company is developing tools to identify opportunities to reduce clients' carbon footprint.

ADMnext approach: Capgemini offers ADMnext, a global, unified approach to apply Agile, DevOps, cloud, API, data platforms and security at an industrial scale in the IT department. This approach fully embraces the migration toward product-centricity: customer journeys, value streams and lean portfolio management. With a key focus on outcome over output, this approach impacts technology-related and other aspects, such as funding, governing and contracting from project-oriented to product-oriented.

Caution

Capgemini has a strong set of frameworks, tools and accelerators. The provider should focus on marketing them by highlighting the success stories and benefits clients have gained through these tools and accelerators.

ISG Provider Lens™

Next-Gen ADM Services
Application Managed Services

U.S. 2023

PORTFOLIO ATTRACTIVENESS

H

Product Challenger

Contender

L

Hexaware

Quinnox ★

Coforge
Kyndryl
Eviden
Persistent Systems
HTC Global

Encora
Cybage
Birlasoft
UST
Infinite
Mphasis
Sofftek
Marlabs
IBM
Zensar

SLK Software

LTIMindtree
DXC Technology
HCLTech
Accenture
Wipro   TCS
Deloitte
Infosys

Capgemini
Cognizant

Tech Mahindra

Leader

Market Challenger

L   **COMPETITIVE STRENGTH**   H   ★ Rising Star

The quadrant evaluates providers responsible for **managing enterprise applications in production**. Services comprise application support, enhancements, platform upgrades, security, bug fixing, troubleshooting and merging enhancements, among others.

Akhila Harinarayan

Capgemini

Leader

> "Capgemini has deep industry expertise and offers access to the latest digital technologies. Significant investments in innovative frameworks and IP and the ability to deliver business value make it one of the leaders in the U.S."
>
> *Akhila Harinarayan*

Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 359,600 employees worldwide. In FY22 the company generated €21.9 billion in revenue, with Applications and Technology as its largest segment. Application development and management and testing services accounted for approximately 63 percent of its total revenue. Capgemini is known for its business value-driven portfolio and service delivery backed by industry expertise. It enables enterprises to realize value and improve CX by implementing business XLAs tied to the Business Process Focus (BPF) framework. It delivers services with more than 50 delivery centers across the Americas.

Strengths

Outcome-driven regional approach: Capgemini helps clients reduce operating costs and achieve business outcomes through various strategies. The company focuses on end-to-end vertical stack models for specific business functions. It uses automation with economic Application Portfolio Management (eAPM) and Enterprise Automation Fabric (EAF) for proactive support. Introducing business XLAs driven by its BPF framework enables clients to realize business value and improve CX.

Automation-first approach: Capgemini's AIOps approach capitalizes on data, employing big data tools for collection and normalization. The AI-driven EAF ingests diverse data for insights and uses data lakes and analytics for ticket data and feedback.

It includes intelligent components for dispatchers, automation assessment and assisted resolution. An AIOps engine based on Splunk Core Enterprise (SCE) and IT service intelligence (ITSI) enables event correlation, self-healing and auto-resolver assignments. ML influences business KPIs, providing measurable benefits.

Scale of operations: Capgemini is one of the most prominent AMS providers in the U.S., with more than 45,000 FTEs for application services. The company has in-depth industry expertise and can meet client needs across industries through its trained and skilled staff for AIOps tools and frameworks.

Caution

Capgemini has a robust presence among large enterprise clients as opposed to midsize and small enterprises. It caters to the manufacturing, healthcare and pharmaceuticals, and CPG industries in the U.S. It should also focus on other verticals as well such as the public sector for better growth prospects.

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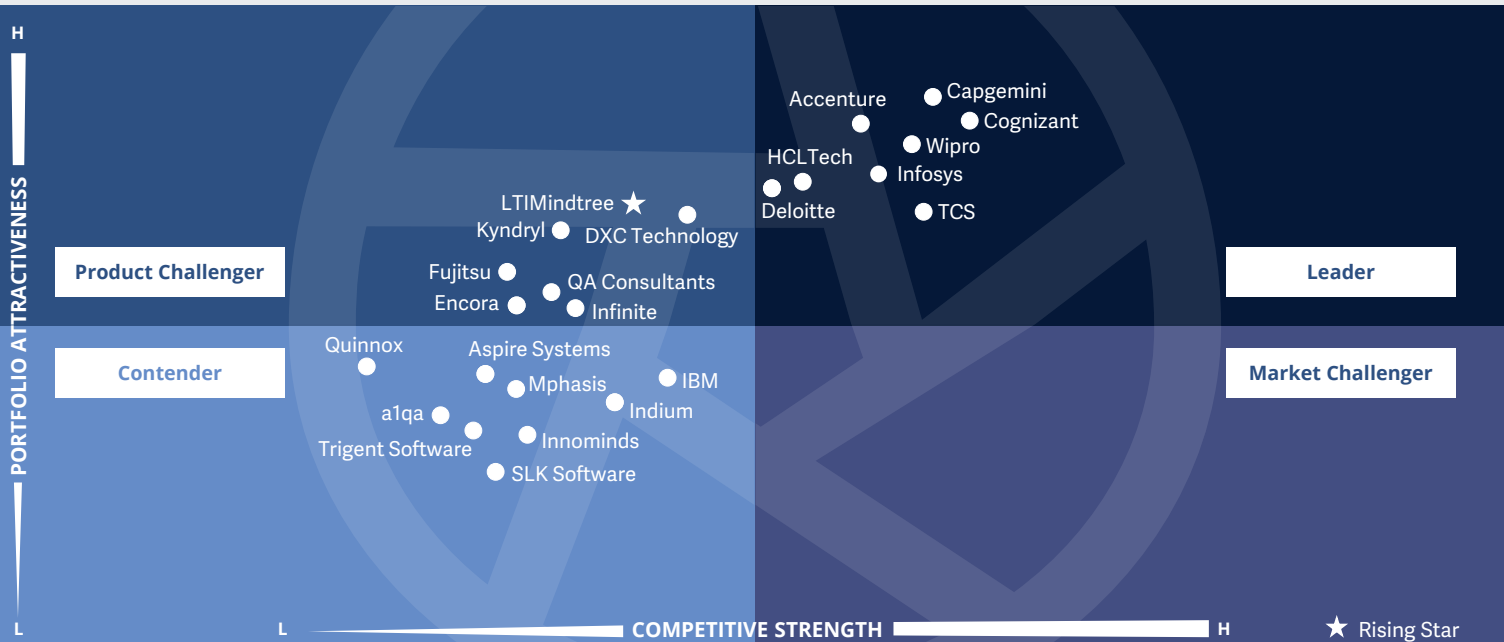
This quadrant assesses providers that offer **comprehensive quality assurance (QA)** programs, including **assessments, design, implementation and QA services**, such as training and education offerings for developers, testers and operators.

Akhila Harinarayan

Capgemini

Leader

"Capgemini is one of the pioneers in offering generative AI use cases for quality engineering, along with platforms for co-creation with the client."

Akhila Harinarayan

Overview

Capgemini is headquartered in Paris, France and operates in 50 countries. It has more than 359,600 employees worldwide. In FY22 the company generated €21.9 billion in revenue, with Applications and Technology as its largest segment. Capgemini's Quality Engineering and Testing portfolio includes software quality validation and testing services. Its offerings include quality advisory services, TCoE (Testing Center for Excellence) for testing as a service (TaaS) and embedded quality engineering in its ADMnext platform. Its services are classified into three pillars of digital assurance: Enterprise Assurance, Customer Experience Assurance and Intelligent Industry Assurance.

Strengths

Real-time dashboard: Cognitive QA (CQA) is an AI-ML powered, intelligent, integrated and near real-time dashboard that provides a consolidated KPI view. It fetches data from multiple sources, such as various test management tools and Excel, among others, to provide quality and governance dashboards at various organizational levels. That, in turn, helps in effective decision-making. It also leverages NLP and cognitive computing techniques to optimize and robotize testing.

Sustainability QE dashboard: Capgemini has developed an accelerator that measures and improves the sustainability of clients' IT applications with its three-dimensional QE approach. Its sustainable QE dashboard helps with green assessment-driven reporting and provides advantages and opinions on economic benefits against sustainability impact. This dashboard supports organizations seeking to reduce their carbon footprint during their QE journey.

Deep expertise: Capgemini has decades of experience delivering AMS, including QA, to enterprises and government agencies worldwide. This expertise has enabled the creation of an extensive knowledge base to address various challenges and solution approaches related to application quality and its management.

Caution

Capgemini should market its strengths related to application quality assurance and highlight its success stories about the latest trends, such as SRE, to present its capabilities to a broader audience.

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Appendix

Methodology & Team

The ISG Provider Lens™ 2023 – Next-Gen ADM Services study analyzes the relevant software vendors/service providers in the Brazilian, European and U.S. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research™ methodology.

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The research and analysis presented in this report includes research from the ISG Provider Lens™ program, ongoing ISG Research™ programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that ISG believes to be current as of August 2023, for providers who actively participated as well as for providers who did not. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

The study was divided into the following steps:

1. Definition of Next-Gen ADM Services market

2. Use of questionnaire-based surveys of service providers/ vendor across all trend topics

3. Interactive discussions with service providers/vendors on capabilities & use cases

4. Leverage ISG's internal databases & advisor knowledge & experience (wherever applicable)

5. Use of Star of Excellence CX-Data

6. Detailed analysis & evaluation of services & service documentation based on the facts & figures received from providers & other sources.

7. Use of the following key evaluation criteria:

   * Strategy & vision

   * Tech Innovation

   * Brand awareness and presence in the market

   * Sales and partner landscape

   * Breadth and depth of portfolio of services offered

   * CX and Recommendation

Author & Editor Biographies

Author

Akhila Harinarayan
Lead Analyst

Akhila Harinarayan is Senior Lead Analyst and the lead author for ISG Provider Lens studies with a focus on Digital Business Transformation and SAP Services. She has more than 12 years of experience across research and consulting including provider strategy, enterprise strategy, industry roadmaps, point-of-view papers, service provider assessment across regions. She has strong expertise on strategy and transformation, digital insights, thought leadership, benchmarking, market assessments and go-to-market strategies.

She has authored many thought leadership papers, digital insight studies, devised go-to-market strategies across products/industries/regions, built frameworks and maturity models across industries for both enterprises, vendors and service providers.

Enterprise Context and Global Overview Analyst

Maharshi Pandya
Research Analyst

Maharshi Pandya is a Research Specialist at ISG and is responsible for supporting and co-authoring ISG Provider Lens™ studies on SAP HANA Ecosystem & Next-Gen ADM Solution and Services. He supports the lead analysts in the research process and authors the global summary report. Maharshi also develops content from an enterprise perspective and collaborates with advisors and enterprise clients on ad-hoc research assignments as well. Prior to this role, he has been associated with several syndicated and custom market research firms, in which he has worked on both, secondary and primary interaction centric research projects around market sizing & forecasting, competitive benchmarking, pricing analysis vendor profiles and market share analysis for several industry verticals such as information and communication technology, media & information services, and automotive. His area of expertise includes analytics, application development and maintenance, and enterprise resource planning.

IPL Product Owner

Jan Erik Aase
Partner and Global Head – ISG Provider Lens™

Mr. Aase brings extensive experience in the implementation and research of service integration and management of both IT and business processes. With over 35 years of experience, he is highly skilled at analyzing vendor governance trends and methodologies, identifying inefficiencies in current processes, and advising the industry. Jan Erik has experience on all four sides of the sourcing and vendor governance lifecycle - as a client, an industry analyst, a service provider and an advisor.

Now as a research director, principal analyst and global head of ISG Provider Lens™, he is very well positioned to assess and report on the state of the industry and make recommendations for both enterprises and service provider clients.

ISG Provider Lens™

The ISG Provider Lens™ Quadrant research series is the only service provider evaluation of its kind to combine empirical, data-driven research and market analysis with the real-world experience and observations of ISG's global advisory team. Enterprises will find a wealth of detailed data and market analysis to help guide their selection of appropriate sourcing partners, while ISG advisors use the reports to validate their own market knowledge and make recommendations to ISG's enterprise clients. The research currently covers providers offering their services across multiple geographies globally.

For more information about ISG Provider Lens™ research, please visit this webpage.

ISG Research™

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ISG

ISG (Information Services Group) (Nasdaq: III) is a leading global technology research and advisory firm. A trusted business partner to more than 900 clients, including more than 75 of the world's top 100 enterprises, ISG is committed to helping corporations, public sector organizations, and service and technology providers achieve operational excellence and faster growth. The firm specializes in digital transformation services, including automation, cloud and data analytics; sourcing advisory; managed governance and risk services; network carrier services; strategy and operations design; change management; market intelligence and technology research and analysis.

Founded in 2006, and based in Stamford, Conn., ISG employs more than 1,600 digital-ready professionals operating in more than 20 countries—a global team known for its innovative thinking, market influence, deep industry and technology expertise, and world-class research and analytical capabilities based on the industry's most comprehensive marketplace data.

For more information, visit isg-one.com.