

# Next-generation Application Management Services PEAK Matrix<sup>®</sup> Assessment 2021

November 2020: Complimentary Abstract / Table of Contents



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- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
- Locations | Cost, skills, sustainability, portfolio – plus a tracking tool
- Tracking services | Service providers, locations, risk
- Other | Market intelligence, service provider capabilities, technologies, contract assessment

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## Background of the research

Application management as a practice area has evolved over the years with changing technologies and enterprise priorities. As with other segments within application services, the focus of application management has been improving productivity and reducing costs while ensuring applications are up and running. Next-generation application management is the evolution of the traditional AMS. More mature models of service delivery, newer financial constructs, and evolved governance models apart from the use of more advanced technologies are some of the differentiating factors of next-generation AMS vis-à-vis traditional AMS. Enterprises are increasingly demanding next-generation AMS from their service providers in order to cut the run spend and divert it toward modernization and creation of new assets.

This report examines the dynamics of the global next-generation application management service provider landscape. We present an assessment of 24 service providers featured on the next-generation application management services PEAK Matrix®.

**This report includes the profiles of the following 24 leading next-generation AMS service providers featured on the next-generation application management services PEAK Matrix®:**

- **Leaders:** Accenture, Capgemini, Cognizant, HCL Technologies, IBM, Infosys, TCS, and Wipro
- **Major Contenders:** Aspire Systems, DXC Technology, LTI, Mphasis, Mindtree, NTT DATA, Softtek, Stefanini, Tech Mahindra, Unisys, UST Global, and Zensar
- **Aspirants:** Datamatics, GAVS, Jade Global, and Yash Technologies

### Scope of this report:



**Geography**  
Global



**Service providers**  
24 leading next-generation application management service providers



**Services**  
Next-generation application management service providers

## Overview and abbreviated summary of key messages

This report examines the global cloud-native application development service provider landscape. It focuses on service provider position, assessment of their delivery capabilities, and key strengths and areas of improvement of cloud-native application development service providers

Some of the findings in this report, among others, are:

### Service provider delivery capability

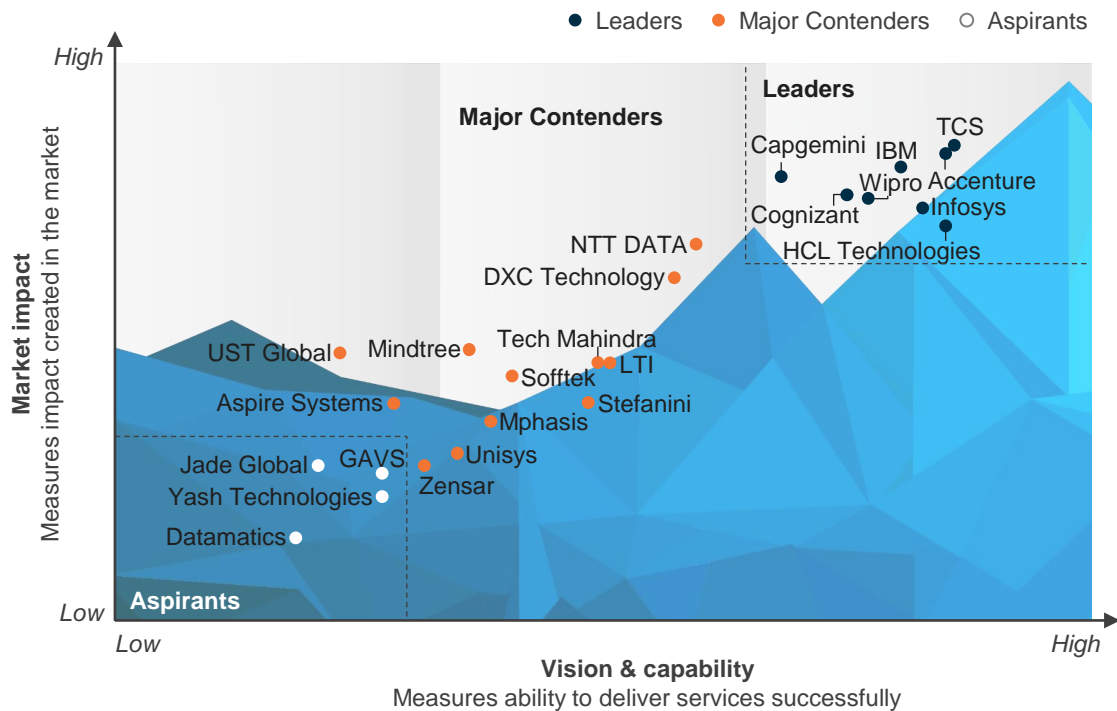
- Next-gen application management service providers can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Accenture, Capgemini, Cognizant, HCL Technologies, IBM, Infosys, TCS, and Wipro are the current leaders in the global next-gen application management market. However, several service providers are emerging as major contenders

### Service provider characteristics

- Leaders have exhibited strong client orientation and have helped their clients in the management of complex business-critical applications using next-generation application management principles to achieve faster time-to-value, enhanced user experience, reduce the run spend, and drive innovation
- Leaders have made significant investments in building IPs and partnerships to accelerate the application development process and deliver custom solutions to clients
- Major Contenders have exhibited a high degree of responsiveness to client requirements and have supported clients in building strategy and prospective business cases
- Major Contenders have been able to develop sophisticated applications and are extensively leveraging partnership network to fill capability gaps
- Aspirants are either focused on a region(s) or vertical(s), or currently have relatively small next-gen AMS practice
- While Aspirants are limited by scale to cater to the requirements of large global players, they have been collaborating with clients and other service providers to drive innovation and value through their niche capabilities

# This study offers four distinct chapters providing a deep dive into key aspects of next-gen application management market; below are four charts to illustrate the depth of the report

Next-gen application management Services PEAK Matrix® Assessment 2020



Note: PEAK Matrix® specific to next-generation application management services  
Source: Inputs from market players, recruitment firms, and investment agencies

Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1	●	○	●	●	○	○	●	○	○
Service provider 2	○	○	○	○	○	○	●	○	○
Service provider 3	○	●	●	●	●	○	○	○	●
Service provider 4	○	○	○	○	●	○	○	○	○
Service provider 5	○	○	○	○	○	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	○	○	○	○	●	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	○	○	○	○	○	○	○

Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

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**

- Service provider 1, has a robust delivery presence in Asia Pacific with multiple delivery centers in India, Australia, the Philippines, and China, enabling it to service client requirements efficiently
- It has a good number of multi-country as well as single-country clients across the world

**Areas of improvement**

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

# Research calendar

## Application services

Published Planned Current release

### Flagship application services reports

	Release date
Application Transformation Services PEAK Matrix® Assessment 2020	December 2019
Application Transformation – Business Pioneering the Agenda – State of the Market	February 2020
Next-generation Quality Assurance – State of the Market	February 2020
Cloud-Native Application Development Services PEAK Matrix® Assessment 2020	August 2020
Application Services State of the market	October 2020
Cloud-Native Application Development Service Provider Compendium	October 2020
<b>Next-generation Application Management Services PEAK Matrix® Assessment 2021</b>	<b>November 2020</b>
Cloud-Native Application Development Services State of the market	Q4 2020

### Thematic application services reports

	Release date
Breakthrough Transformation	October 2019
Talent Readiness for Next-generation IT Services PEAK Matrix® Assessment 2020 – Closing the Demand-Supply Gap	December 2019
Upcoming Contract Renewals – Application Services 2020	March 2020
Rapid Application Development Platform Trailblazers: Top 14 Start-ups in Low-code Platforms – Taking the Code Out of Coding	May 2020
Strength in Adversity: Enterprise Service Resilience During the COVID-19 Crisis	June 2020
Winning the War for Talent: An Enterprise Guide to Building a Sustainable Workforce Strategy	July 2020
Cloud-based Application Modernization	July 2020

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