ISG Provider Lens™

Next-gen Application Development & Maintenance (ADM) Services

Continuous Testing – Large Accounts

U.K. 2020

Quadrant Report

A research report comparing provider strengths, challenges and competitive differentiators

Customized report courtesy of:

Infosys®

December 2020

About this Report

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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 November 2020 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.

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ISG Provider Lens

ISG Provider Lens™

ISG Provider Lens™ delivers leading-edge and actionable research studies, reports and consulting services focused on technology and service providers' strengths and weaknesses and how they are positioned relative to their peers in the market. These reports provide influential insights accessed by our large pool of advisors who are actively advising outsourcing deals as well as large numbers of ISG enterprise clients who are potential outsourcers.

For more information about our studies, please email ISGLens@isg-one.com, call +49 (0) 561-50697537, or visit ISG Provider Lens™ under ISG Provider Lens™.

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EXECUTIVE SUMMARY

Next-gen ADM Services

COVID-19, plus Brexit, hit the U.K. industry in a time of ever-increasing pressure on IT to deliver change and value at the same time. The challenging political and market situations globally and especially in the U.K. in 2020 are leading to a lot of uncertainty in business outlook and thus reduced spending on IT. Politically initiated insecurities about the exact procedures that companies need to follow for Brexit, continuing into November 2020, raise the demand for super-fast software development and agile change management. The COVID-19 pandemic make things worse, with added requirements for secure and fast home-office workplaces with higher software quality, huge demand for additional tools to be integrated quickly and seamlessly and the need for a much higher level of security for all employees. Many IT departments have been in mere reaction mode, facing changing demands every few weeks, and are working on optimizing their application base at the same time.

The market growth in next-gen ADM is driven by a strong demand for optimized software portfolios, continuous modernization at higher speeds to gain market advantages, and digital transformation to drive both employee productivity and the digital customer journey. Continued investment in technologies like IoT, blockchain, artificial intelligence (AI) and machine learning (ML) and others opens up new challenges for next-gen ADM providers. They are challenged both to manage integration into the client's IT landscape and to further develop and integrate features like AI and ML seamlessly into their offerings.

Automation has become a major driver of next-gen ADM services. Every large provider has been investing heavily in its own AI and ML technology stack, some of them offering it as-a-service to smaller providers and clients. Expectations are high but often cannot be met, both because of the complexity of the systems itself and because of the complexity of tasks they might face. AI systems are still strongest in pattern recognition tasks based on extremely large data sets, so most of the implementations are within large testing environments in production settings. True self-healing software and AI-driven business process improvements still lie in the future.

Along with the realization of digitalization projects - supported by an ever-expanding technology and tool stack - solving cultural issues is becoming more of the essence. Agile and DevOps technologies cannot be optimized until the company is ready to shift toward an agile culture and drive this shift both in business and in IT processes.

Application Maintenance Services – Midmarket / Niche

AMS providers focus strongly on code improvement and often work in industry-vertical environments. They cover application operations, support, maintenance, enhancements, change management and process improvement. Also, due to clients' requirements for reduced development and maintenance costs and improved system stability, they face a growing demand for security, reporting and dashboarding. Frameworks such as IT Information Library (ITIL) have become de facto standards to achieve services standardization and to establish reliability and accountability in AMS.

In the U.K., a strong demand for localized and industry-specific niche services drives a variety of new approaches from service providers to cover the midmarket. For the large Indian service providers, the U.K. has always been the first and foremost important European market and their base for expansion onto the continent. With Brexit, this might change – depending on what happens in an insecure political framework. Some large providers have started to serve smaller clients out of large client installations, thus offering geographically closer support. Others expand their offshore capabilities and put a strong emphasis on distributed, agile teams.

Automation is gaining speed. Service providers are also leveraging ML, natural-language processing (NLP) and robotic process automation (RPA), driven by a demand for faster error detection and improved problem-handling and automated provisioning.

Agile Development

In many respects, Agile remains a double-sided coin for enterprises. It can drive application and process development into new levels of creativity and speed, but it requires a change in culture that is difficult to execute. Agile changes the way large organizations behave and collaborate, but it is hard to scale and does not work well with offshoring in every aspect. Therefore, providers look closely at the cultural aspect of Agile development, integrating virtual elements in collaboration and onboarding, and are using gamification, hackathons, ideation platforms and other workspace initiatives to drive the necessary cultural change.

Scaling Agile involves tools that facilitate knowledge management and collaboration, but also code-sharing, containers, container management and code repositories, as well as automation in all areas of development. Projects also are including proprietary frameworks and tools. Providers educate and drive their own workforces to offer Agile delivery, and they are partnering with bodies such as Scaled Agile Framework (SAFe) and automation tool providers such as Docker, Ansible and Jenkins and getting certifications from Scrum Alliance, Scrum.org, SAFe and Disciplined Agile Delivery (DAD).

Continuous Testing

With the COVID-19 crisis and many clients having their staff working from home, plus the changes that come with Brexit, the market is strongly demanding fast and reliable testing mechanisms and processes. Key drivers include a focus on resiliency and stability, the move to hybrid cloud environments and modernization of legacy systems. Testing is shifting left into earlier stages of production and becoming part of Agile development cycles. Teams are testing small parts of the software as early as possible instead of testing at the end of the sprint. Scaling Agile thus becomes an issue with testing, too.

AI and ML are becoming state-of-the art technologies for testing environments, used to recognize patterns and correlations beyond what software engineers could possibly find out with their human means. AI also starts to show advantages in predictive analytics for software quality and performance. It creates more testing data by itself, so some providers have AI systems trained by other AI systems for dedicated tasks.

In the midmarket, the focus is on setting up a thorough continuous testing practice and integrating it with Agile and DevOps practices. Most midmarket companies face similar challenges as large corporations, just on a smaller scale and with less budget and often very limited knowledge and human resources. Metrics measurement, governance and security become focus aspects of continuous testing service providers. The multitude of tools - partly open-source and niche - requires a well-trained workforce, a clear go-to-market strategy and geographic presence.

DevSecOps Consulting

DevSecOps covers the three key areas of people, process and tools for continuous delivery of software development. It has developed out of DevOps practices that have integrated security as a key aspect of software development, delivery and operations. DevSecOps is rapidly merging with automation and continuous testing to deliver a complete software creation process.

A wealth of tools, practices and models creates a very complex and confusing landscape. Clients will have to find their best pick for a set of tools that are unique to their enterprise. Large providers underline their capabilities by partnering with a large number of tools providers and educating their staff on a multitude of tools and models. Often, they develop and offer industry-related best practices to implement DevSecOps within the client's environment in order to accelerate development and delivery individually.

Introduction

Simplified illustration

Next-Gen Application Development & Maintenance Services	
Next-Gen ADM	Application Maintenance Services – Midmarket / Niche
Agile Development	DevSecOps Consulting
Continuous Testing – Midmarket and Expert Consulting	Continuous Testing – Large Accounts

Source: ISG 2020

Definition

Application outsourcing continues to evolve, and service providers are increasingly adopting Agile development practices for their service delivery. Changes are being driven by client demand for increased velocity, more frequent updates and feature-led, intuitive and interactive digital applications. Although the application outsourcing market continues to have waterfall-based traditional development engagements, the incorporation of disruptive Agile-based operating models continues to outpace the former, thereby making the core development model a direct competitive advantage for many enterprises. Enterprise customer requirements are currently being led by mobile and other emerging technologies, which, in turn, are fueling the transformation of the application services landscape.

Enterprises are adapting to this changing environment through faster releases and deployments of application services. Of course, not all application outsourcing is the same, because not all buyers and users have the same needs. The typical application development and maintenance (ADM) services include

Definition (cont.)

application consulting, design, custom development, packaged software integration, operations, quality assurance, security and testing. However, the elements related to speed and faster releases in this traditional approach are coming from DevOps and Agile methodologies. Service providers are leveraging application programming interfaces (APIs) and microservices and are utilizing low-code/no-code platforms, containers and a cloud-native approach to build nimble, manageable applications and accomplish their speedy release.

ISG has been witnessing contracts where clients are looking to new ways to leverage software capabilities to solve business problems, gain competitive advantage and address the increasing need for speed to market. Service providers are augmenting their traditional ADM offerings with these emerging methodologies, technologies and collaborative frameworks to meet their clients' objectives. ISG terms such contract types as next-gen ADM contracts. This study focuses on understanding client objectives and assessing provider capabilities to deliver on next-gen ADM contracts.

Scope of the Report

The ISG Provider Lens™ study offers IT-decision makers:

- Transparency on relevant provider' strengths and weaknesses;
- A differentiated positioning of providers by segments;
- Focus on different markets, including the U.S., Germany, the U.K., the Nordic countries and Brazil.

Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

Leader

The Leaders among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

Product Challenger

The Product Challengers offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the Leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor's size or their weak footprint within the respective target segment.

Market Challenger

Market Challengers are also very competitive, but there is still significant portfolio potential and they clearly lag behind the Leaders. Often, the Market Challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and therefore have some potential to optimize their portfolio and increase their attractiveness.

Contender

Contenders are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.

Provider Classifications (cont.)

Each ISG Provider Lens™ quadrant may include a service provider(s) who ISG believes has a strong potential to move into the leader's quadrant.

Rising Star

Rising Stars are usually Product Challengers with high future potential. Companies that receive the Rising Star award have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Rising Stars also have excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12 to 24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service. In dependence of the market ISG positions providers according to their business sweet spot, which can be the related midmarket or large accounts quadrant.

Next-gen Application Development & Maintenance (ADM) Services - Quadrant Provider Listing 1 of 3

	Next-gen ADM	Application Maintenance Services – Midmarket / Niche	Agile Development	DevSecOps Consulting	Continuous Testing – Midmarket and Expert Consulting	Continuous Testing – Large Accounts
Accenture	Leader	Not in	Not in	Not in	Not in	Not in
Birlasoft	Contender	Contender	Not in	Contender	Not in	Contender
Cognizant	Leader	Leader	Leader	Leader	Leader	Leader
LTI	Rising Star	Product Challenger	Rising Star	Product Challenger	Product Challenger	Rising Star
Hexaware	Product Challenger	Rising Star	Product Challenger	Not in	Not in	Not in
Capgemini	Leader	Not in	Leader	Leader	Not in	Leader
UST Global	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Not in	Product Challenger
Infosys	Leader	Leader	Leader	Leader	Leader	Leader
Coforge	Product Challenger	Product Challenger	Product Challenger	Not in	Product Challenger	Product Challenger
Persistent	Contender	Not in	Not in	Product Challenger	Not in	Product Challenger
IBM	Leader	Not in	Product Challenger	Not in	Not in	Leader
DXC	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Leader

Next-gen Application Development & Maintenance (ADM) Services - Quadrant Provider Listing 2 of 3

	Next-gen ADM	Application Maintenance Services – Midmarket / Niche	Agile Development	DevSecOps Consulting	Continuous Testing – Midmarket and Expert Consulting	Continuous Testing – Large Accounts
YASH Technologies	Contender	Contender	Contender	Contender	Not in	Not in
TCS	Leader	Leader	Leader	Leader	Product Challenger	Product Challenger
Mphasis	Product Challenger	Product Challenger	Contender	Contender	Not in	Not in
Zensar	Contender	Contender	Not in	Contender	Product Challenger	Product Challenger
HCL	Leader	Product Challenger	Leader	Rising Star	Rising Star	Product Challenger
Atos	Product Challenger	Product Challenger	Product Challenger	Leader	Product Challenger	Product Challenger
Mindtree	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger	Product Challenger
Wipro	Leader	Leader	Leader	Leader	Leader	Leader
Tech Mahindra	Leader	Not in	Product Challenger	Product Challenger	Not in	Market Challenger
Ciber	Contender	Product Challenger	Not in	Not in	Not in	Not in
Aveva	Not in	Not in	Not in	Not in	Not in	Not in
Getronics	Contender	Product Challenger	Not in	Not in	Not in	Not in

Next-gen Application Development & Maintenance (ADM) Services - Quadrant Provider Listing 3 of 3

	Next-gen ADM	Application Maintenance Services – Midmarket / Niche	Agile Development	DevSecOps Consulting	Continuous Testing – Midmarket and Expert Consulting	Continuous Testing – Large Accounts
Endava	Contender	Product Challenger	Contender	Product Challenger	Not in	Not in
EPAM	Not in	Not in	Product Challenger	Not in	Not in	Not in
BJSS	Not in	Not in	Product Challenger	Contender	Not in	Not in
Cognizant	Not in	Not in	Not in	Not in	Not in	Not in
TestingXperts	Not in	Not in	Not in	Not in	Product Challenger	Not in
SopraSteria	Not in	Not in	Not in	Not in	Contender	Contender
SLK Group	Not in	Not in	Not in	Not in	Product Challenger	Product Challenger
a1qa	Not in	Not in	Not in	Not in	Contender	Contender
BT	Not in	Not in	Not in	Product Challenger	Not in	Not in
Validata	Not in	Not in	Not in	Not in	Contender	Contender
Fujitsu	Product Challenger	Not in	Not in	Not in	Not in	Not in
CGI	Contender	Not in	Not in	Not in	Not in	Not in

ISG Provider Lens™

Next-gen Application Development & Maintenance (ADM) Services Quadrants

ENTERPRISE CONTEXT

Continuous Testing – Large Accounts

This report is relevant to enterprises across industries in the U.K. for evaluating providers of continuous testing for large accounts.

In this quadrant report, ISG highlights the current market positioning of providers of continuous testing for large accounts in the U.K. and the way they address the key challenges faced by enterprise clients in the country.

The need among enterprises for quality assurance at speed and for automated testing approaches such as shift-left and end-to-end automation across testing phases drives this market. Enterprises are now adopting this methodology as their current testing process is time-consuming and increases cost of delivery. Service providers are addressing these challenges by bringing development, testing and operations together in seamlessly planning, managing, and executing testing to accelerate the process.

ISG sees increasing demand for cloud-native applications among enterprises that are built end to end and managed on cloud using technologies such as containers and APIs. Enterprises must evaluate providers that can benefit them in addressing all the above challenges.

Who should read the report:

IT and technology leaders should read this report for a clear understanding of the strengths and weaknesses of service providers in their ADM practice and to understand how they integrate the latest technologies/capabilities into their service offerings to find a competitive edge in the market.

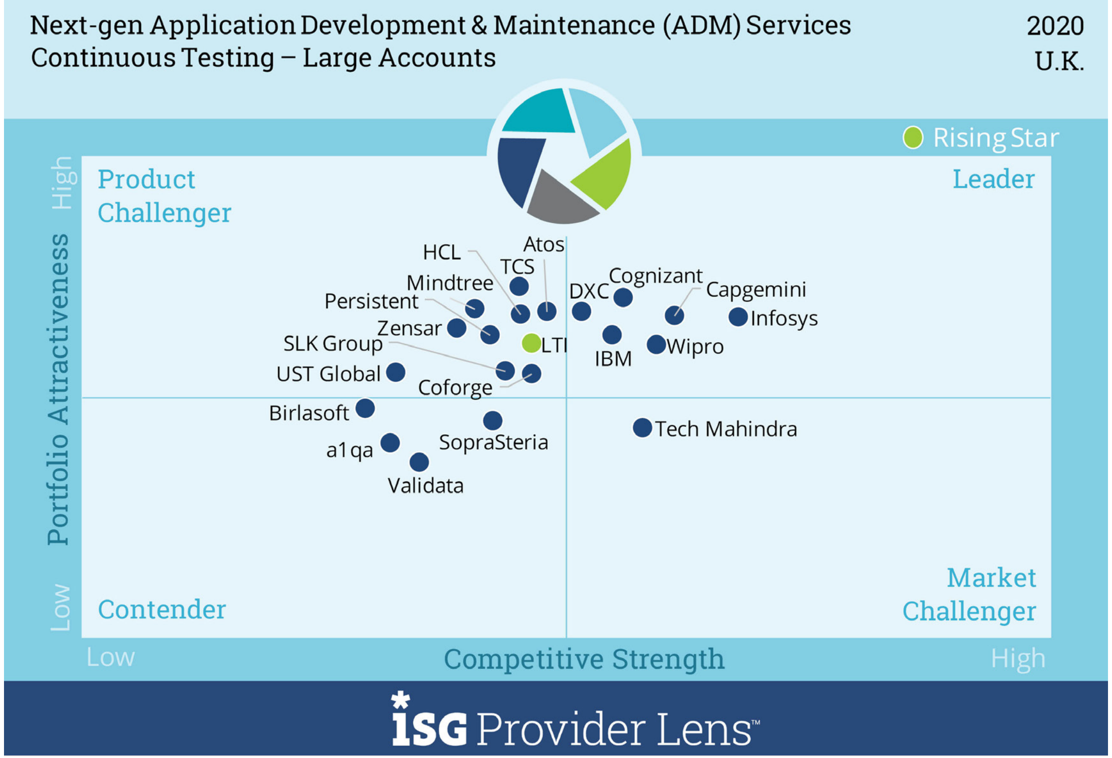
Line-of-business and industry leaders should read this report to understand the relative positioning of the partners that can help them effectively procure the application services for their business/industry and to ensure return on investment.

CONTINUOUS TESTING – LARGE ACCOUNTS

Definition

Continuous testing focuses on delivering quality assurance at speed. In terms of technology, it encompasses various aspects of automated testing such as shift-left and end-to-end automation across testing phases and at every phase of the continuous delivery process. However, in terms of people and processes, it goes beyond automation-based testing. Thus, continuous testing increases collaboration among quality assurance (QA) and development teams to sync with sprint cycles, do feature-driven testing, be responsive to change, create a feedback loop and support greater client involvement. Continuous testing is gaining momentum, especially to help enterprises keep pace with their Agile and DevOps initiatives.

Continuous Testing for Large Accounts includes service providers that focus on large clients, usually supporting more than 5,000 users for enterprises with more than $1 billion in annual revenue.



Source: ISG Research 2020

CONTINUOUS TESTING – LARGE ACCOUNTS

Eligibility Criteria

- Providers should exhibit execution using test-driven development (TDD), behavior-driven development (BDD) and other approaches.
- Providers should demonstrate capabilities to provision and use service (test) virtualization processes and test case management.
- These providers can handle large-scale testing and continuous integration demands of complex systems such as ERP, multisite e-commerce, multicountry solutions and other systems with a large number of test cases.

Observations

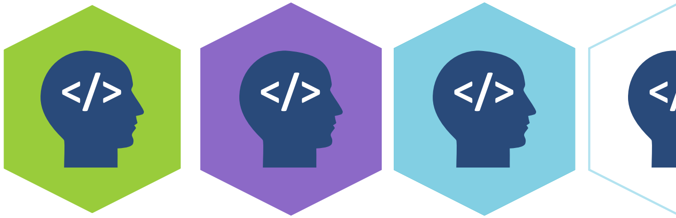
The integration of automation capabilities and AI solutions keeps driving the continuous testing market

- **Capgemini** provides a comprehensive solution for continuous testing and numerous industry-specific tools. It has a strong focus on industry-specific testing procedures. Capgemini is continuously redesigning its tools stack to stay ahead of the changing market trends.
- **Cognizant** is one of the world's leading professional testing services, offering a good mix of digital assurance pivots and continuous testing services to meet the digital business needs of its enterprise customers. Cognizant's strategy in the U.K. focuses on expansion of its continuous testing talent.
- With the acquisition of Luxoft, **DXC** has very good solutions in continuous testing. DXC has extensive capabilities offshore, placing high stakes on its efforts to enable offshore testing at its customers, with a focus on risk-based and exploratory testing.
- **IBM** uses its testing environments and services to improve its own software stack. It has deep knowledge of testing methodologies and innovative methods, provides strong capabilities for cloud-based testing and leverages the cognitive capabilities of Watson AI.

CONTINUOUS TESTING – LARGE ACCOUNTS

Observations (cont.)

- **Infosys** has a broad spectrum of test environment management, backed and supported by its core accelerators and utilities. The firm focuses on building strength in the U.K. using a local-hire strategy and expanding its nearshore presence.
- With a share of 88 percent of its testing projects running in Agile and 40 percent in DevOps mode, **Wipro** has become one of the leading providers for continuous testing. It is continuously evolving its AI-based HOLMESTM platform to bring intelligent automation to the application testing and support lifecycle.
- Rising Star **LTI** provides its own proprietary AI-based platforms and tools. The company uses AI and ML in influence requirements, design, test cases and development, predictive insights, test optimi-zation and monitoring to amplify the benefits of automation.



INFOSYS

Overview

Infosys is an Indian multinational corporation that provides business consulting, information technology and outsourcing services. The company is headquartered in Bengaluru, India. Infosys reported $12 billion in revenue in 2020, with more than 242,000 employees in 46 countries. It generates $7.8 billion from ADM business, of which $700 million comes from more than 150 clients in the U.K.

Infosys, a leading application testing service provider, leverages its execution capabilities to help clients deliver Agile and continuous testing. The company is focused on training its employees in more than one skill set to add value to clients' business. Its application testing revenue in Europe stands at $350 million, with around 48 percent contributed by the continuous testing practice.

Strengths

Comprehensive framework: Infosys has a broad spectrum of test environment management capabilities, backed and supported by its core accelerators and utilities. The company has defined a 3x3 model to cater to different test environment needs. The model has deep roots in all three aspects: Core (workload, storage and compute), Niche (multi-cloud, containers and cloud native), and Emerging Technologies across three horizontals (compliance, security and governance).

Clear local strategy: Infosys focuses on building strength in the U.K. using a local hire strategy, aggressively building nearshore centers. It has opened delivery centers and an innovation hub in London. Infosys has also built Legacy Modernization solutions and the Infosys Open Banking Testing Solution.

Innovation focused: Infosys' well-defined community of practices (CoP) structure, which caters to emerging continuous testing avenues, helps the company to focus on innovations. Additionally, the company has a dedicated CoE for DevOps continuous testing consulting and architecture, test management and design, Python and AI/ML, DevOps engineering, process and collaboration.

Caution

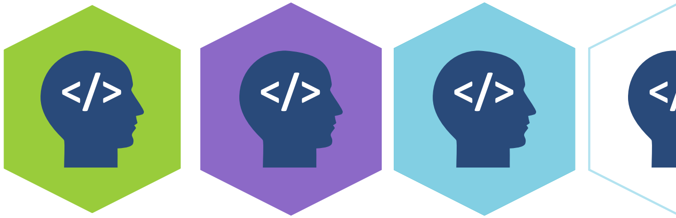
In automation tools, Infosys has a focus on Selenium, Junit, Maven and Cucumber, and less so on Lisa and SoapUI. It could strengthen its focus on other automation tools, such as Tricentis Tosca and Appium, to improve its scope of testing tools.

2020 ISG Provider Lens™ Leader

Infosys provides a comprehensive and complete testing framework and a strong and expanding presence in the U.K. and is an excellent and innovation-focused partner.

Methodology

METHODOLOGY



The research study “ISG Provider Lens™ 2020 – Next-gen Application Development & Maintenance (ADM) Services” analyzes the relevant software vendors/service providers in the U.K. market, based on a multi-phased research and analysis process, and positions these providers based on the ISG Research methodology.

The study was divided into the following steps:

1. Definition of Next-gen Application Development & Maintenance (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 and use cases
4. Leverage ISG’s internal databases and advisor knowledge and experience (wherever applicable)
5. Detailed analysis and evaluation of services and service documentation based on the facts and figures received from providers and other sources.
6. Use of the following key evaluation criteria:
   - Strategy & vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements

Authors and Editors

Oliver Nickels, Author

Lead Analyst

Oliver Nickels has in-depth technical and business know-how and more than 20 years of experience as marketing manager, management consultant and start-up entrepreneur to contribute to ISG customer projects. His focus is on marketing optimization, digital marketing and the digital customer journey.

Oliver works as free-lance consultant to help ISG customers with all issues related to the digital customer journey and digital marketing. Before, Oliver worked many years in various national and international marketing roles for a leading global IT company, in his last position as digital marketing manager with responsibility for the digital customer communications of a business unit and as advisor for the management board.

Oliver holds a degree in computer sciences of the University of Bremen and is a certified marketing assistant. He has also undergone a business model development training.

Oliver has received various marketing rewards, including the gold CLIO, the gold Best of B2B and the gold and bronze German Dialog Marketing Award.

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Arul has been working with ISG for more than two years and his area of expertise is on Application Development & Maintenance (ADM). During his tenure, he has developed content for ISG Provider Lens™ in the areas of Next-gen Application Development & Maintenance (ADM), SAP HANA and Leonardo Ecosystem and Data Analytics Services & Solutions. As part of ISG Provider Lens™, Arul is responsible for supporting research authors and authoring blogs about niche technologies, market trends and insights.

Jan Erik Aase, Editor

Director and Principal Analyst

Jan Erik Aase is a director and principal analyst for ISG. He has more than 35 years of collective experience as an enterprise client, services provider, ISG advisor and analyst. Jan Erik has overall accountability for the ISG Provider Lens™ reports, including both the buyer-centric Archetype reports and the Quadrant reports focused on provider strengths and portfolio attractiveness. He sets the research agenda and ensures the quality and consistency of the Provider Lens™ team.

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