ISG Provider Lens™

Next-gen Application Development & Maintenance (ADM) Services

DevSecOps Consulting

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.

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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

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

ENTERPRISE CONTEXT

DevSecOps Consulting

This report is relevant to enterprises across industries in the U.K. for evaluating providers offering DevSecOps consulting.

In this quadrant report, ISG highlights the current market positioning of providers of DevSecOps consulting in the U.K. based on depth of service offering and market presence.

Many enterprises, due to changing business needs, want to develop applications with greater speed, shorter time to market and shorter release cycles in order to increase efficiency. Enterprises now also want to shorten the software development lifecycle (SDLC) and integrate security in every phase of the application development lifecycle, as the data used by enterprises and end users is vulnerable. To cater to the needs of enterprises, service providers address the above challenges by following DevSecOps methodology in the application development lifecycle to ensure data security, integrity and non-violation of privacy.

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

Who should read the report:

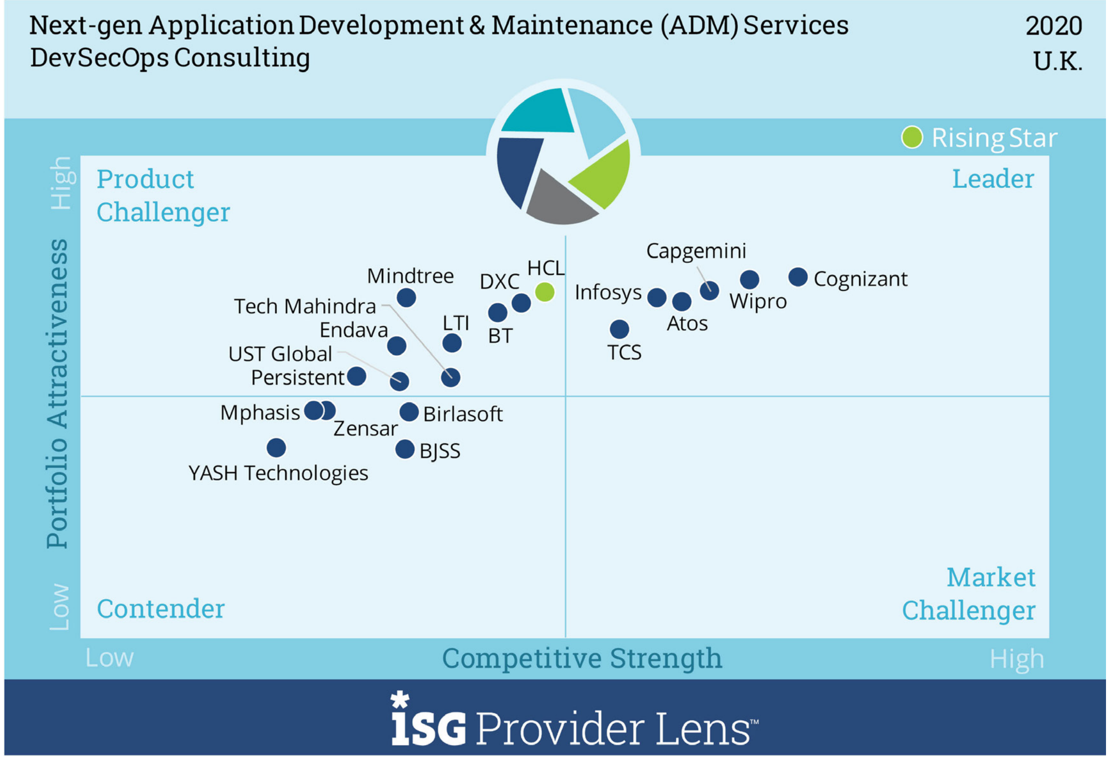
IT and technology leaders should read this report for a clear understanding of the strengths and weaknesses of service providers in their ADM practice and to understand how they integrate the latest technologies/capabilities into their service offerings to find a competitive edge in the market.

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.

DEVSECOPS CONSULTING

Definition

DevSecOps is a software development practice that combines development and technology operations in tandem to shorten the software development lifecycle and integrates security within the entire lifecycle. To achieve this, DevSecOps involves three key principles: system thinking, feedback loops and continuous experimentation and learning. Some of the methodologies involved in DevSecOps include lean management, continuous delivery and "people over process over tools." Cloud-native applications are built end to end and managed on the cloud using technologies such as containers and APIs. Containers, as a part of the continuous integration/continuous development (CI/CD) methodology, are being used to decrease the infrastructure dependencies to develop applications faster.



Source: ISG Research 2020

DEVSECOPS CONSULTING

Eligibility Criteria

- Providers should be implementing methodologies such as infrastructure as code, continuous improvement, people over process over tools, feedback loops, Lean, kaizen and other principles.
- The provider should offer development teams with more than two to three years training in scripting languages such as Python, Perl, Shell and Ruby, and in operating systems like Linux and Unix.
- DevOps teams should have application-level understanding of Git, Bucket (for source control), Jenkins, Bamboo (continuous integration), infrastructure automation (Chef, Puppet, Ansible), Docker and Kubernetes (containers), Mesos and Swarm (orchestration) and other areas.
- DevOps teams should be able to implement automation technologies and tools at any level from testing and operations to development.
- The provider should guide clients to improve how they manage and migrate applications to the cloud (public, private or hybrid) using multiple container technologies such as Docker and Kubernetes.

Observations

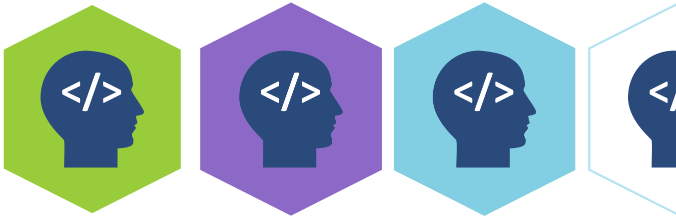
DevSecOps has developed rapidly out of the DevOps offerings and combines Agile development aspects as well as platforms and tools.

- **Atos** has a clear strategy to accommodate the cultural shift to DevOps and DevSecOps for clients. It provides a broad spectrum of industry-standard IPs, tools and differentiators and offers a variety of pricing models for DevSecOps projects.
- **Capgemini** has extensive experience in DevOps and DevSecOps, spanning the whole development chain, as part of its end-to-end next-generation ADM solution. Capgemini's organizational change management framework can manage and address challenges in people and process management.
- **Cognizant** combines Agile and DevSecOps practices into a solution approach to modernize applications, rigorously practicing Agile development methodologies within one large framework - deeply understanding the cultural shift that comes with Agile and DevSecOps development.
- **Infosys** provides a strong global organization with systems thinking and design thinking at its core. These are part of career development and refactoring programs and are mandated at certain levels. Infosys uses DevSecOps methodologies across its entire organization.

DEVSECOPS CONSULTING

Observations (cont.)

- **TCS** provides Agile and DevSecOps solutions by focusing on proprietary solutions and methodologies. It provides a robust practice combining onshore and offshore capabilities with a DevSecOps culture and location-independent Agile models to implement DevSecOps at scale.
- **Wipro** is continuously evolving its DevSecOps and AI platforms to bring intelligent automation to the DevSecOps environment. Wipro uses its own augmented systems thinking concept, a combination of continuous flow frameworks and the engineering twin concept.
- Rising Star **HCL** is one of the fastest-growing technology services companies, investing significantly in reskilling, upskilling and acquiring new talent for its DevSecOps resource pool. HCL's DevSecOps approach revolves around people, process and tools, with a higher emphasis on "people first".



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 has 48 enterprise clients with DevSecOps projects in the U.K., generating $100 million revenue in 2019. It employs approximately 220 FTEs in this field in the U.K. and operates three delivery centers. Infosys also provides a broad range of niche and emerging technology capabilities with dedicated CoEs for data science, RPA, DevOps automation and other areas of expertise.

Strengths

Global DevSecOps practice: Globally, Infosys had approximately 8,400 DevSecOps professionals developing CI/CD pipelines for active engagements during 2019. An additional 26,000 employees have application-level understanding of DevSecOps pipelines. Out of ongoing engagements, at least 50 customers are serviced through the CoE model. Teams are geographically distributed.

Strong application development practice: Infosys' modernization services cover cloud adoption, legacy modernization, open-source adoption and agile DevSecOps areas. The practice has a pool of more than 28,000 cloud consultants, out of which over 3,500 are certified practitioners. It caters to the business needs of over 400 clients globally and uses more than 100 tools and accelerators to deliver business value to enterprises.

DevSecOps rooted in the organization: Systems thinking and Design thinking have been a part of career development and refactoring programs and mandated at certain levels. Infosys uses aspects of DevSecOps across its entire organization. These include DevSecOps assessment and roadmap exercises, continuous improvement in customer engagements with systems thinking methodologies and multivendor scenarios at the core of Infosys service offerings.

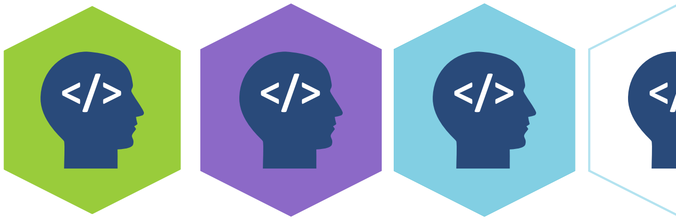
Caution

The company could focus on partnering more with local and niche providers to further expand its footprint in the region.

2020 ISG Provider Lens™ Leader

Infosys has a large global practice that has DevSecOps deeply rooted in the entire organization and in their minds, providing excellent methodologies and vast experience.

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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Jan Erik Aase, Editor

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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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