

***ISG** Provider Lens™

Next-gen Application Development & Maintenance (ADM) Services

Next-gen ADM

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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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

Next-gen ADM

This report is relevant to enterprises across industries in the U.K for evaluating providers offering next-gen application development and maintenance services.

In this quadrant report, ISG highlights the current market positioning of providers for next-gen application development and maintenance services in the U.K. based on depth of service offering and market presence.

The dual threats of Brexit and COVID-19 have triggered a change in the IT landscape in the U.K., driving down investments when compared with previous years.

Many enterprises want to modernize and revitalize their applications used in business processes, as a considerable portion of those applications are built with legacy architectures. For these enterprises, it is tough to keep up with business changes as their applications do not have a modular architecture, which leads to downtime, cost overruns and increased maintenance. As a result, now, the enterprises seek or want to develop applications that fit in the overarching technology landscape. In addition, many organizations want multiple applications working seamlessly on multiple channels as part of their IT strategy.

These enterprises have specific IT infrastructure needs, such as security, agility, scalability and integrity. ISG also notes that many of these implementations take place in different cloud environments (public or private) based on the criticality of the data. A service provider can support an enterprise client by addressing the challenges (stated above).

The complexity of application development or modernization is directly proportional to the size of an enterprise and the application. Therefore, large enterprise clients prefer service providers with a skilled workforce, high integration capabilities and a global presence. Most of the large enterprise implementations occur at a global level, involving multiple regions, so enterprises should look not only at the depth of offering of a service provider, but also at its regional presence and local expertise.

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.

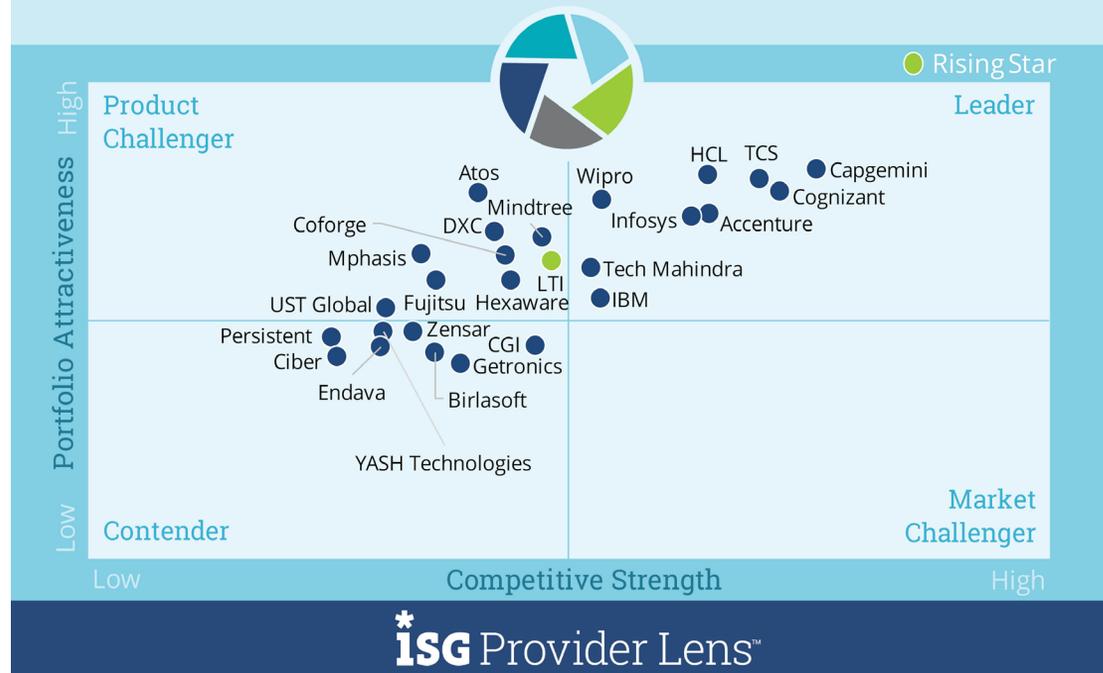
NEXT-GEN ADM

Definition

Like traditional application services, next-generation ADM includes consulting, design, custom development, packaged software integration, DevOps, Agile, operations, security (including application security, governance and other related areas), application maintenance and testing. However, the scope, delivery mechanism and outcome for such contracts pivot around a value-based approach where the focus is on achieving enterprise agility and solving business problems. This quadrant analysis assesses service providers based on their capability to augment traditional ADM services with emerging technologies and methodologies like Agile development, DevOps, automation, data analytics and artificial intelligence, plus digital and modernization techniques to deliver application lifecycle projects. It assesses provider capabilities in incorporating new approaches to deliberately focus on business results during application development and delivery.

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

2020
U.K.



Source: ISG Research 2020

NEXT-GEN ADM

Eligibility Criteria

- Capabilities to cover the lifecycle of ADM services, including design, development, integration, security and testing, along with consulting
- Provider's ability to showcase its execution and use of emerging technologies and methodologies like Agile, DevOps, chaos reengineering and automation in its ADM processes
- Capabilities and frameworks to offer digitalization and modernization techniques for legacy application modernization, application portfolio rationalization and replacement
- Ability to handle large-scale application development and maintenance teams with robust governance and processes that enable quality assurance, team-performance SLAs and remote delivery with a nearshore or offshore capacity

Observations

Next-gen ADM in the U.K. is heading toward automation and integration of tools to handle complexity of large implementations. Also, speed of change implementation is of the essence, as many companies face unpredictable changes with the looming Brexit.

- **Accenture** has extensive experience in delivering complex projects on a global scale and managing large application development groups. Within its next-gen ADM scope, Accenture also leverages its own analytics, automation and AI technologies.
- Next-gen ADM is an important service-line revenue generator for **Capgemini**, offering a broad and integrated spectrum of services to large clients. Capgemini is investing heavily in expanding its ADMnext offering and thus also leading in the field of innovation.
- **Cognizant** bundled its ADM services to extract synergies from the integration and increase its focus both on application optimization and modernization as well as on the security of the customers' application portfolios.

NEXT-GEN ADM

Observations (cont.)

- **HCL** is one of the fastest-growing technology services companies, offering a comprehensive 360-Degree Digital Service Catalogue consisting of consulting, applications and platforms as well as data and analytics services. This is underlined by strong capabilities in automation.
- **IBM** covers a broad spectrum of technologies, including end-to-end application lifecycle management, Garage methodologies for Agile development projects and cultural change, and Watson AI technology in every stage of the project.
- **Infosys** has adopted an AI and automation strategy across the organization and provides deep technology expertise, many strategic partners, a broad range of niche and emerging technology capabilities and a platform driven next-gen ADM approach.
- **Tech Mahindra** moves forward with a new and innovative strategy of a partner-led engagement in which it collaborates on innovative solution development and delivery. Tech Mahindra offers multiple flexible pricing models and has been expanding its footprint through a series of mergers and acquisitions.
- **TCS** delivers next-gen ADM services through a product-centric operating model, assisted by cognitive automation and analytics in the background. TCS' AMS services are based on a proprietary framework, AI-based components and rich expertise across a variety of technologies.
- **Wipro** has strong expertise across all ADM services, focusing on expanding its investments in AI and bots, extensive developer experience and cloud-native development. Wipro is extending this emphasis to its ADM practice with their devNXT platform.
- Rising Star **LTI** has a history of high client retention and continues to drive a strong proportion of its revenue from repeat business. LTI has invested a significant percentage of its revenue in research and has carried out a number of acquisitions to grow its offering.

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. Infosys generates \$7.8 billion from ADM business, of which \$700 million comes from more than 150 clients in the U.K.

Infosys' digital framework focuses on experience, insight, innovation, acceleration, and assurance by enabling clients with AI-powered services, Agile digital at scale and dynamic learning for building and transferring new skills, expertise, and ideas from its innovation ecosystem. Infosys also adopted an AI and automation strategy across the organization with design accelerators, digital studios, partner ecosystems and innovation hubs.

Strengths

Deep technology expertise: Infosys has more than 16,000 SAP experts, 18,000 business intelligence (BI) and analytics consultants, 3,500 cloud experts and many strategic partners, thus it can manage large application development and maintenance organizations. Infosys also provides a broad range of niche and emerging technology capabilities with dedicated centers of excellence (CoEs) for Data Science, RPA, DevOps Automation and other areas of expertise.

Platform-driven approach: Infosys offers a platform-driven next-gen ADM approach with Infosys Live Enterprise Application Management Platform (LEAP). It provides a platform-centric approach for AMS services that makes application management agile, intelligent, integrated and aligned to business requirements. Infosys LEAP Application Maintenance and Support services leverage Infosys Nia™, a knowledge-based AI platform.

Modernization Suite: Infosys Modernization Suite is a standardized application modernization solution that supports a wide range of technologies from legacy to modern open-source and cloud technologies. It integrates with Infosys Agile and DevOps methodologies and also provides database migration.

Caution

Like many competitors, Infosys generates most of its revenue in manufacturing industries. This limits its ability to outgrow the competition.



2020 ISG Provider Lens™ Leader

Infosys strongly adopted AI technologies and delivers deep technology expertise and excellent end-to-end service capabilities.



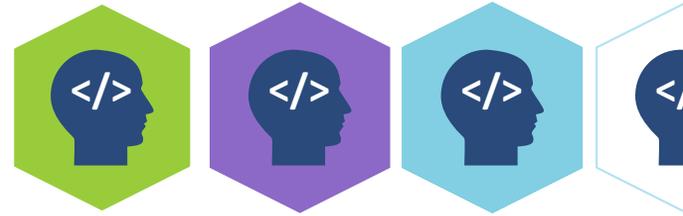
Methodology

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.

Authors and Editors



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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.



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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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