



# **Topic: Independent Testing Services – PEAK Matrix™ Assessment and Profile Compendium 2014**

Information Technology Outsourcing (ITO)  
Market Report: July 2014 – Preview Deck

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## Custom research capabilities

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

<sup>1</sup> Banking, financial services, and insurance

# Background and scope of the research

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## Background of the research

- With technology playing a critical role in shaping the future of enterprises, buyers are increasingly investing in independently validating their systems and processes. In a very competitive market place, service providers are strengthening their capabilities and are looking to build domain specific capabilities in order to meet business objectives
- In this research, we present the assessment and detailed profiles of 17 IT service providers featured on the independent testing services PEAK Matrix. Each service provider profile provides a comprehensive picture of their service suite, scale of operations, domain investments, recent transactions, and key low-cost delivery centers
- The assessment is based on Everest Group's annual RFI process for the calendar year 2014, interaction with leading testing service providers, and analysis of the testing services market place

## Scope of this report

- **Services:** Independent testing services
- **Geography:** Global
- **Service providers:** The leading 17 independent testing service providers

This report includes the profiles of the following 17 service providers:

- **Independent testing services PEAK Matrix Leaders:** Accenture, Cognizant, and TCS
- **Independent testing services PEAK Matrix Major Contenders:** Capgemini, CSC, HCL, IGATE, Infosys, L&T Infotech, MindTree, Syntel, Tech Mahindra, and Wipro
- **Independent testing services PEAK Matrix Emerging Players:** EPAM, Hexaware, NIIT Technologies, and Softtek

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# The report assesses and maps 17 service providers on Everest Group's PEAK Matrix for independent testing services

This report provides the assessment and detailed profiles of the 17 IT service providers featured on Everest Group's independent testing services PEAK Matrix. The PEAK Matrix is specific to IT service providers who deliver independent testing services such as:

- Advisory services (QA assessment and framework, test processing consulting)
- Domain-based testing (domain-specific functional testing, compliance testing, etc.)
- Test data management and tool services
- Manual testing (functional system testing, SI testing, UAT, etc.)
- Enterprise apps testing (SAP testing, CRM testing, etc.)
- Performance testing
- Specialized testing (Service virtualization, SOA testing, etc.)
- Cloud-based testing (TaaS)
- Mobile apps testing
- Infrastructure testing services

**Assessment of the service provider landscape for independent testing services leveraging Everest Group's PEAK Matrix highlights the following categories of service providers:**

## Independent testing services

- **Leaders:** Accenture, Cognizant, and TCS
- **Major Contenders:** Capgemini, CSC, HCL, IGATE, Infosys, L&T Infotech, Mindtree, Syntel, Tech Mahindra, and Wipro
- **Emerging Players:** EPAM, Hexaware, NIIT Technologies, and Softtek

# This compendium report has 17 profiles, focusing on providers' scale of operations, testing services capabilities, domain investments, delivery footprint, and market success

## ABC | Independent testing services profile (page 1 of 4)

### Corporate and independent testing services overview

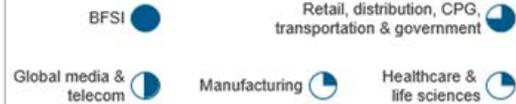
**Company description:** ABC is a global information technology, consulting, and outsourcing company that is present across 65 countries. ABC provides a range of IT application and infrastructure services, product engineering, technology integration, and consulting solutions. We estimate ABC's revenue from independent testing services to be in the range of US\$0.25-1 billion in 2013 (with North America being the leading market, followed by Europe and APAC, both having similar adoption levels). ABC has more than 16,000 resources

**Headquarters:** Pune, India  
**Website:** www.abc.com

#### Independent testing services segments



#### Independent testing services: Top 5 industries (relative adoption)



Source: Everest Group (2014)



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EGR-2014-X-R-XXXX

**Portfolio of testing services:** Business assurance services (business process testing and test automation); testing services (S3F management, test environment certification); test development and execution services

**Examples of proprietary platform with prebuilt initiatives:** ABC360 a

#### Independent testing

<US\$50 million

US\$250-500 million

#### Independent testing



## ABC | Independent testing services profile (page 2 of 4)

### Independent testing services capability assessment and market success



#### Headline assessment

ABC's engineering heritage has stood it in good stead, with the company successfully building out a complete portfolio of testing services. ABC's strategy aims at providing a full range of end-to-end enterprise assurance offerings, including specialized testing services. ABC has also built the capability to provide catalog-based services on a utility model, thereby creating a flexible and consistent experience for enterprise customers. ABC can create greater market success with proactive articulation of its innovation capabilities with existing clients, as well as the broader marketplace.

#### Market success

- Independent testing services revenue in the range of US\$0.25-1 billion for 2013
- The company has more than 500 active clients
- The service line has witnessed a growth of more than 12% per annum over the last two years

#### Scale

- Independent testing services account for more than 5% of the overall company revenue
- More than 16,000 FTEs engaged in delivering independent testing services across various service segments

#### Scope

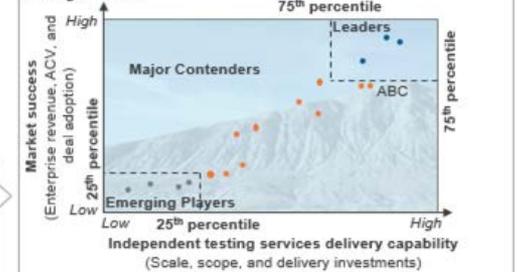
- Custom applications testing is the key focus area for ABC, followed by package testing, middleware/database testing, and non-functional testing
- While North America accounts for the largest share of the testing services revenue, Europe and APAC have also witnessed sizable adoption
- Key verticals include BFSI, telecom and the "retail, distribution, CPG, transportation, and government" segments

Source: Everest Group (2014)



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#### ABC's position on Everest Group's PEAK Matrix for independent testing services



#### Domain investments

- ABC has invested in building a wide array of tools and accelerators for broad-based testing, as well as industry-specific testing services
- It has designed its own testing certification framework (UCF)
- The company has established a strong partnership network with testing tool providers (e.g., SP1, SP2, SP3, SP4, and AP5)

#### Delivery footprint

- ABC has India-centric delivery model, with the country accounting for most of the testing services resources
- XX is the only other sizable low-cost delivery location

Source: Everest Group (2014)



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# ITO research calendar

■ Published ■ Current

Topic	Release date
European Infrastructure Services – Service Provider Landscape with PEAK Matrix™ Assessment 2014 .....	January 2014
Upcoming Contract Renewals – Infrastructure Services .....	March-2014
Upcoming Contract Renewals – Application Services .....	March-2014
Contract Renewal Database (April 2014 to April 2016) .....	April-2014
In Search of ADM Productivity .....	May-2014
Application outsourcing – Annual Report 2014: “Rationalization Goes Hyper” .....	May-2014
Infrastructure Outsourcing (IO) – Annual Report 2014: “The Future is Software” .....	June-2014
Boosting Productivity in Independent Testing Services .....	June-2014
Independent Testing Services – PEAK Matrix™ Assessment and Profile Compendium 2014 .....	July-2014
Enterprise Mobility .....	Q3-2014
Big Data Analytics – Next Frontier .....	Q3-2014
Changing face of IO T&C .....	Q3-2014
Automating IT services .....	Q4-2014
Next-gen application service .....	Q4-2014

# Additional research recommendations

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The following documents are recommended for additional insight into the topic covered in this research. These documents either provide additional details on the topic, or complementary content which may be of interest

- 1. Boosting Productivity in Independent Testing Services:** ([EGR-2014-4-V-1138](#)) 2014: This report continues our ongoing research on the productivity agenda for the broader IT services market, with a specific focus on testing services. This report contains:
  - A productivity maturity framework for testing services
  - Best practices for boosting productivity in testing services
  - Recommendations for enterprises seeking to enhance productivity in testing services
- 2. Application Outsourcing – Annual Report 2014: “Rationalization Goes Hyper”:** ([EGR-2014-4-R-1120](#)) 2014: This annual research deep dives into the application outsourcing landscape. It provides data-driven facts and perspectives on the overall market. The research covers AO adoption trends, demand drivers, and buyer expectations. The research analyzes buyer challenges, trends shaping the market, and also provides an outlook for 2015 for the broader IT as well as AO market

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### At a glance

- With a fact-based approach driving outcomes, Everest Group counsels organizations with complex challenges related to the use and delivery of the next generation of global services
- Through its practical consulting, original research, and industry resource services, Everest Group helps clients maximize value from delivery strategies, talent and sourcing models, technologies, and management approaches
- Established in 1991, Everest Group serves users of global services, providers of services, country organizations, and private equity firms in six continents across all industry categories

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