



# Independent Testing Services PEAK Matrix™ – Europe-focused – Assessment and Profile Compendium 2015

Application and Digital Services  
Market Report: September 2015 – 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

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

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# 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 getting their systems and processes independently validated. In a highly competitive marketplace, service providers are strengthening their capabilities and are looking to build domain-specific competencies in order to meet business objectives. Increasingly, service providers are focusing on Europe, however, the diversity within the region is causing service providers to respond with varying approaches
- In this research, we present the assessment and brief profiles of 16 IT service providers featured on the independent testing services PEAK Matrix for Europe. Each service provider profile provides a brief picture of its domain investments, scale of operations, and key clientele
- The assessment is based on Everest Group's annual RFI process for the calendar year 2015, interaction with leading testing service providers, and analysis of the testing services market

## Scope of this report

- **Services:** Independent testing services
- **Geography:** Europe
- **Service providers:** Leading 16 independent testing service providers

This report includes the profiles of the following 16 service providers:

- **Leaders:** Accenture, Atos, and Capgemini
- **Major Contenders:** Cognizant, CSC, EPAM, HCL Technologies, IBM, Infosys, TCS, Tech Mahindra, and Wipro
- **Aspirants:** Dell Services, L&T Infotech, Mindtree, and Virtusa

# This report focuses on independent testing services and provides insights into leading service providers in the European region

NOT EXHAUSTIVE

This report focuses on “independent testing services” in Europe and considers services where testing components are included in a separate Statement of Work (SOW) for the engagement.

Focus of research

## Independent testing services

- Advisory services (QA assessment and framework, test processing consulting, etc.)
- 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 application 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

This report also provides insights into their delivery capabilities, scale, domain investments, key clientele, and partnerships.

# This independent testing services provider compendium report has 16 service provider profiles, focusing on their domain investments, scale of operations, and key clientele

*EVEREST GROUP ESTIMATES*

Service provider	Independent testing services revenue from Europe (US\$ million)	Major low-cost delivery centers in Europe	Independent testing services in Europe: Focus areas, investments, and clientele <sup>1</sup>
Service provider 1	200 - 400	Hungary and Poland	<ul style="list-style-type: none"> <li>• Europe comprises an estimated 20% of its independent testing services revenue, with most of it coming from United Kingdom</li> <li>• Increased spotlight on Continental Europe (France, Germany, Nordics, and Benelux); supplementing onshore presence in United Kingdom</li> <li>• Key clientele includes A, B, and C</li> </ul>
Service provider 2	100 - 200	Lithuania, Bulgaria, and Czech Republic	<ul style="list-style-type: none"> <li>• Europe constitutes over 30% of Service provider 2 independent testing services revenue</li> <li>• Significant nearshore presence and joint solutions with technology partners help to retain and win European clients</li> <li>• Key clientele includes A, B, and C</li> </ul>
Service provider 3	<100	Romania	<ul style="list-style-type: none"> <li>• Majority of Service provider 3 independent testing services revenue comes from United Kingdom; Europe accounts for ~17% of its independent testing services revenue</li> <li>• Investing in enhancing its nearshore delivery centers and growing a sales and marketing presence</li> </ul>
Service provider 4	<100	Belarus, Hungary, Russia, Ukraine, and Poland	<ul style="list-style-type: none"> <li>• Europe comprises almost half of its global revenue from independent testing services; United Kingdom accounts for ~10% of its European independent testing services revenue</li> <li>• Strong presence in low-cost delivery centers in Eastern Europe provides quick flexibility, nearshoring capability, and cultural comfort for European clients</li> <li>• Key clients includes A, B, and C</li> </ul>

Source: Everest Group (2015)

# Application and digital services research calendar

■ Published    ■ Current  
**Release date**

Topic	Release date
Optimizing IT Service Delivery: Technology is the Answer .....	February 2015
Practitioner Perspectives – Wayne Butterfield Interview .....	March 2015
Upcoming Contract Renewals – Application Services .....	March 2015
The Agile Journey: Following Agile to Being Agile .....	May 2015
Application Services – Annual Report 2015: “Agile to DevOps? Not so Fast” .....	July 2015
Enterprise Digital Adoption: High Returns, Will They Sustain? .....	July 2015
Digital Effectiveness in UK Retail Banking – Introducing the APEX Matrix™ to Identify the Digital Banking Leaders .....	July 2015
Digital Effectiveness in U.S. Retail Banking – Introducing the APEX Matrix™ to Identify the Digital Banking Leaders .....	July 2015
Independent Testing Services – PEAK Matrix™ Assessment and Profile Compendium 2015 .....	July 2015
North America Digital Adoption Survey – How Pervasive is Your Digital Strategy? .....	August 2015
Independent Testing Services PEAK Matrix™ – Europe-focused – Assessment and Profile Compendium 2015 .....	September 2015
Testing Services Market Update 2015 – Digital Testing, Buyers Beware ! .....	Q3 2015
Digital adoption market update – Europe focused .....	Q3 2015
PEAK Matrix – Digital Services .....	Q3 2015
PEAK Matrix – SaaS implementation .....	Q4 2015
What's Your Mobility Strategy? .....	Q4 2015



# Additional research references

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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. Independent Testing Services – PEAK Matrix™ Assessment and Profile Compendium 2015:** ([EGR-2015-4-R-1506](#)); 2015. This Everest Group research provides a comprehensive assessment of the leading IT service providers in independent testing services. In this report, we provide the profiles and assessment of 23 IT service providers featured on Everest Group's PEAK Matrix for independent testing services. In addition to the assessment of the 23 service providers' capabilities and market success, the report also provides insight into their scale of operations, scope of coverage across the independent testing services spectrum, and domain investments.
- 2. 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

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## About Everest Group

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