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▶ Procurement

▶ Recruitment & Talent Acquisition

▶ Service Optimization Technologies

▶ Transaction Intelligence

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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 - **Application Services**
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Corporate Headquarters

Office: +1-214-451-3000

info@everestgrp.com



European Headquarters

Office: +44-207-129-1318

unitedkingdom@everestgrp.com



Delhi Office

Office: +91-124-284-1000

india@everestgrp.com

* Banking, financial services, and insurance

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Background of the research

Background of the research

- In a competitive environment, where business success often hinges on application success, enterprises have to deliver their products and solutions to the market faster in order to stay competitive and relevant. This requires them to adopt Agile and DevOps models, in which testing is often tightly integrated into the application delivery models
- While enterprises are beginning to bemoan the relevance of independent testing in the context of an integrated DevOps model, service providers are strengthening their capabilities to deliver end-to-end assurance to their clients. Providers are also investing in next-generation technologies, such as Artificial Intelligence (AI), to stay ahead of the adoption curve and capitalize on its potential to disrupt the traditional models of independent testing
- In this research, we present the assessment and detailed profiles of 22 IT service providers featured on the independent testing services PEAK Matrix. Each service provider profile presents a comprehensive picture of its service suite, scale of operations, and domain investments
- The assessment is based on Everest Group's annual RFI process for the calendar year 2017, interaction with leading testing service providers (including pure-play testing providers), client reference checks, and analysis of the testing services market

Scope of this report

- **Services:** Independent testing services
- **Geography:** Global
- **Service providers:** 22 leading IT service providers

This report includes the profiles of the following 22 service providers on the independent testing services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, IBM, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Capgemini, Cigniti, EPAM, HCL Technologies, L&T Infotech (LTI), Mindtree, Syntel, Tech Mahindra, and VirtusaPolaris
- **Aspirants:** GAVS Technologies, Hexaware, Infogain, Luxoft, Softtek, and Zensar

This report focuses on independent testing services and provides insights into leading service providers

NOT EXHAUSTIVE

This report focuses on “independent testing services” 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 (testing-as-a-service)
- Mobile apps testing
- Infrastructure testing services

This report also provides insights into delivery capabilities, scale, domain investments, focus on verticals, type of testing services, and partnerships of these service providers.

This independent testing services provider compendium report has 22 service provider profiles, focusing on their service suite, scale of operations, and domain investments

Company A | Testing services profile (page 1 of 2)

Independent testing services overview

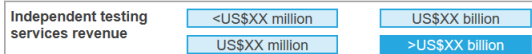
Strengths

- Company A has made notable investments in IP development that leverage next-generation themes of AI and machine learning to improve QA services
- Its consulting-led model, coupled with its partner ecosystem and automation portfolio, position it as a Leader

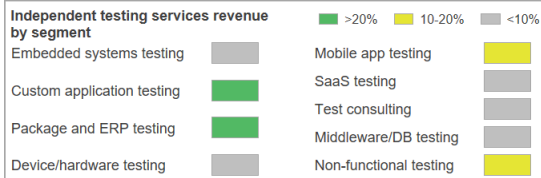
Areas of improvement

- Company A will have to ensure its "price premium" tag is mitigated through next-generation advanced automation solutions
- Some clients may perceive heavy technology usage in QA service delivery as overengineering and Company A will need to address this segment suitably

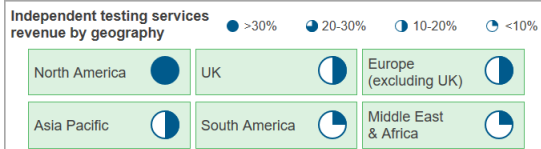
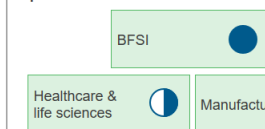
Vision: Company A wants to help clients rotate to the new in cloud, digital, and security-related services. All of this is powered by New IT, which is transforming the way things are being tested to drive greater productivity, accelerate business agility, and shift to continuous testing. Company A wants to help clients use New IT to anticipate and respond to change faster through open innovation, enabling them to be more intelligent, automated, adaptable, and future-ready.



Scope and coverage: Test consultancy services (assessments, strategy & management, and requirements assessments), functional testing, performance testing (automation, performance, agile, and cloud testing), test CoE, test environment testing, and unit-based testing delivery.



Independent testing services: Top 5 industries



Independent testing services revenue by buyer size

Small (annual revenue < US\$XX billion)
 Medium (annual revenue = US\$XX billion)
 Large (annual revenue > US\$XX billion)

Company A | Testing services profile (page 2 of 2)

Testing services offerings and recent developments

Testing services – proprietary solutions (representative list)

Solution	Details
Company A myWizard®	Key focus is on AI and cognitive. Intelligent automation platform that includes a Virtual Testing Savant that helps human testers with test planning, test coverage, prioritization, and staffing. It also includes <ul style="list-style-type: none"> • Testing Advisor: Provides test artifacts for reuse and other solutions based on past fixes • Company A Artificial Intelligence Engine: Open-source-based platform that offers solutions for incident and defect management, code repair, and service email classification & routing
Company A Touchless Testing Platform	Key focus is on test automation. Intelligent automation platform for continuous testing of enterprise and custom applications; leverages analytics, visualization, and AI techniques to eliminate manual tasks; helps clients to drive business agility, improve quality, and reduce overall testing effort <ul style="list-style-type: none"> • Cognitive computing engine (developed with Saffron Tech) uses NLP to enable early defect discovery, removal of duplicate defects, and defect coalescence through similarity analytics and association mapping
Company A Omni-Channel Testing Platform	Key focus is on mobility. Integrated platform tests and monitors digital applications in an omnichannel environment across mobile devices, desktops, kiosks, smart TVs, and wearables; helps testing teams to shift focus from finding defects and inconsistencies to fine-tuning application performance to deliver business impact
Company A Digital Security Testing Framework	Key focus is on mobility. Provides secure design review and automated static & dynamic analysis, including network and forensic security tests and vulnerability assessments with recommendations for fix and remediation to ensure apps are safe and secure

Testing services partnerships (representative list)

Partner name	Details
Applause	Crowdfunding alliance to expand capabilities and geographic scope of Company A testing services; Company A has made a minority investments in Applause
SOASTA	Alliance to provide on-demand performance engineering to digital enterprises; Company A has made a minority investment in SOASTA

Additionally, Company A has alliances with leading tool vendors such as company B&C; emerging providers such as B&C, X&Y; as well as enterprise software companies such as XYZ and ABC among others

Other investments / recent activities (representative list)

Activity
Investing in research with Massachusetts Institute of Technology on synthetic data creation for test data management

Company A | Testing services profile (page 1 of 2)

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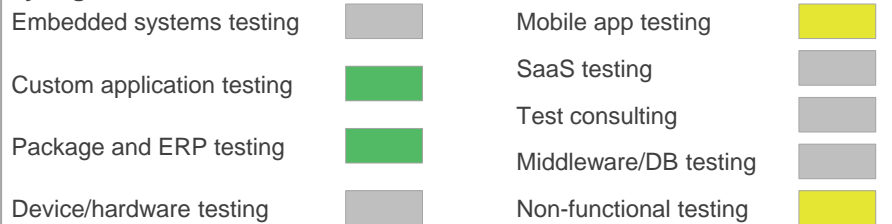
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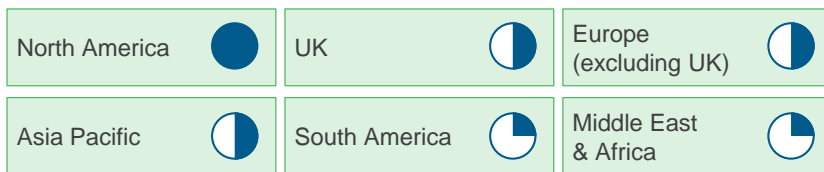
Independent testing services revenue



Independent testing services revenue by segment

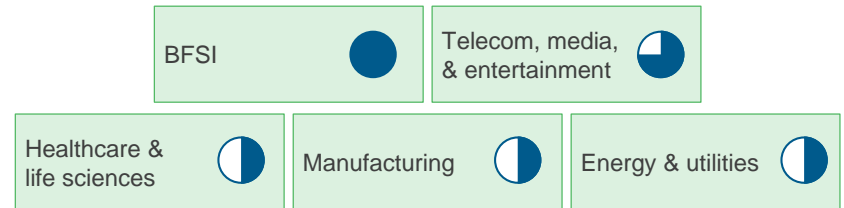


Independent testing services revenue by geography

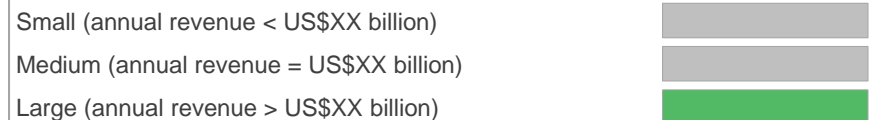


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Independent testing services: Top 5 industries



Independent testing services revenue by buyer size



Source: Everest Group (2017)

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Source: Everest Group (2017)

Application services research calendar

■ Published
 ■ Current

Topic	Release date
CSC-HPE Services Merger	May 2016
Application Services – Annual Report 2016: “No DevOps No Digital”	May 2016
Independent Testing Services – Market Trends and PEAK Matrix™ Assessment & Profiles Compendium	June 2016
IT Application Services Automation: Think Benefits, Not Costs	November 2016
Customer (Dis)Satisfaction: Why Are Enterprises Unhappy with Their Service Providers?	January 2017
Upcoming Contract Renewals – Application Services	February 2017
Application Services – Annual Report 2017: Artificial Intelligence (AI) in SDLC? There is a Long Journey Ahead	April 2017
Independent Testing Services – PEAK Matrix™ Assessment & Profiles Compendium: “Reports of QA’s Death are Not Exaggerated”	May 2017
IT Automation in Application Services – PEAK Matrix™ Assessment for Products/Solutions	Q2 2017

Additional research recommendations

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

- 1. Customer (Dis)Satisfaction: Why Are Enterprises Unhappy with Their Service Providers? ([EGR-2017-4-R-2077](#)); 2017.** Insights from our research reveal that almost 50% of the enterprises are dissatisfied with their service providers, whose average performance score as strategic partners is merely 5 on 10. Whereas service providers meet the technical requirements stated in the agreement, in reality, they seldom meet customer expectations on the softer engagement aspects. The enormous gap between the stated and the unstated expectations leaves the majority of customers discontented with their service providers
- 2. Application Services - Annual Report 2017: Artificial Intelligence (AI) in SDLC? There is a Long Journey Ahead ([EGR-2017-4-R-2145](#)); 2017.** Artificial Intelligence (AI) is no longer a fringe fantasy-riddled technology; it has witnessed high interest from enterprises, technology majors, and service providers. Its growth from basic AI to an enabler of breakthrough innovation is sparking interest from all industry participants. AI and its allied techniques will profoundly impact application services in the way applications are developed, tested, and maintained.

For more information on this and other research published by Everest Group, please contact us:

Chirajeet Sengupta, Partner:
Yugal Joshi, Practice Director:
Gunjan Gupta, Practice Director:
Siddharth Muzumdar, Senior Analyst:
Alisha Mittal, Senior Analyst:
Koshika Sood, Senior Analyst

chirajeet.sengupta@everestgrp.com
yugal.joshi@everestgrp.com
gunjan.gupta@everestgrp.com
siddharth.muzumdar@everestgrp.com
alisha.mittal@everestgrp.com
koshika.sood@everestgrp.com

Website: www.everestgrp.com | Phone: +1-214-451-3000 | Email: info@everestgrp.com



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Dallas (Headquarters)

info@everestgrp.com
+1-214-451-3000

Bangalore

india@everestgrp.com
+91-804-276-4533

Delhi

india@everestgrp.com
+91-124-496-1000

London

unitedkingdom@everestgrp.com
+44-207-129-1318

New York

info@everestgrp.com
+1-646-805-4000

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