

Application Services
Market Report – May 2018: Complimentary Abstract / Table of Contents

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EGR-2018-32-CA-2639

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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

Table of contents (page 1 of 2)

Topic	Page no.
Introduction and overview	05
Section I: Enterprise QA services market trends	10
Section II: PEAK Matrix for enterprise QA services	24
• PEAK Matrix framework	25
• PEAK Matrix for QA services	27
• QA services PEAK Matrix characteristics	30
• Summary dashboard	31
Section III: Profiles of QA service providers	35
• Accenture	36
• Atos	38
• Capgemini	40
• Cigniti Technologies	42
• Cognizant	44
• DXC Technology	46
• HCL	48
• Hexaware	50
• IBM	52
• Infogain	54
• Infosys	56
• LTI	58

Table of contents (page 2 of 2)

Topic	Page no.
Section III: Profiles of QA service providers (continued)	
• Mindtree	60
• Mphasis	62
• NTT DATA	64
• QualiTest	66
• Softek	68
• Syntel	70
• TCS	72
• Tech Mahindra	74
• Virtusa	76
• Wipro	78
• Zensar	80
Appendix	82
• Glossary of key terms	83
• Research calendar	84
• References	85

Background of the research

Background of the research

- The QA landscape has been evolving over the past decade and there is a clear shift from independent testing of applications to a more holistic brand assurance of business processes and outcomes
- Even as enterprises adopt Agile and DevOps and continue on their journey of integrated testing, service providers are strengthening their capabilities to deliver end-to-end QA orchestration to their clients. Providers are also investing in Artificial Intelligence (AI) and Machine Learning (ML) to expand their test automation suite of tools and IP, and even include performance and security testing into the continuous delivery model, thus enabling brand assurance for their clients business
- In this research, we present the assessment and detailed profiles of 23 IT service providers featured on the QA 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 2018, interaction with leading QA service providers (including pure-play testing providers), client reference checks, and analysis of the QA services market

Scope of this report

- **Services:** Enterprise QA services
- **Geography:** Global
- **Service providers:** Covers 23 leading IT service providers

This report includes the profiles of the following 23 service providers on the QA services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, Infosys, TCS, and Wipro
- **Major Contenders:** Atos, Capgemini, Cigniti, DXC Technology, HCL Technologies, IBM, LTI, Mindtree, NTT Data, QualiTest, Softtek, Syntel, Tech Mahindra, and Virtusa
- **Aspirants:** Hexaware, Infogain, Mphasis, and Zensar

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

NOT EXHAUSTIVE

This report focuses on “**enterprise QA services**” defined as quality assurance services for IT systems, which are delivered by career QA professionals across different types of engagements with enterprises.

 Focus of research

Enterprise QA services

- Advisory services (QA assessment and framework, test processing consulting, etc.)
- Domain-based QA (domain-specific functional testing, compliance testing, etc.)
- Test data management and tool services
- Manual testing (functional system testing, System integration (SI) testing, User Acceptance Testing (UAT), etc.)
- Enterprise application QA (SAP testing, Customer Relationship Management (CRM) testing, etc.)
- Performance QA
- Specialized QA (service virtualization, Service Oriented Architecture (SOA) testing, etc.)
- Cloud-based QA (testing-as-a-service)
- Mobile apps QA
- Infrastructure QA services

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

This report is based on four key sources of proprietary information

- Everest Group's annual RFI process with leading QA service providers, followed by briefing sessions with their leadership teams and buyer reference conversations
- Key elements covered in these interactions include:
 - Vision and strategy for enterprise QA services
 - Scale of operations and delivery locations
 - Areas of investment (partnerships, mergers & acquisitions (M&A), Intellectual Property (IP), innovation, etc.)
 - Recent transaction history

- Proprietary database of IT service providers (updated annually)
- The database tracks the following for each service provider:
 - Revenue and number of FTEs
 - Number of clients
 - FTE split by different lines of business
 - Revenue split by region
 - Location and size of delivery centers
 - Technology solutions developed

- **Service provider briefings**
 - Vision and strategy
 - Annual performance and future outlook
 - Key strengths and improvement areas
 - Emerging areas of investment

- **Buyer reference interviews, ongoing buyer surveys, and interactions**
 - Drivers and challenges for adopting QA services
 - Assessment of service provider performance
 - Emerging priorities
 - Lessons learnt and best practices

Service providers assessed



Note: Assessment for Atos includes partial inputs from the service provider, and is based on Everest Group's estimates that leverage its proprietary data assets, service provide public disclosures, and interaction with buyers

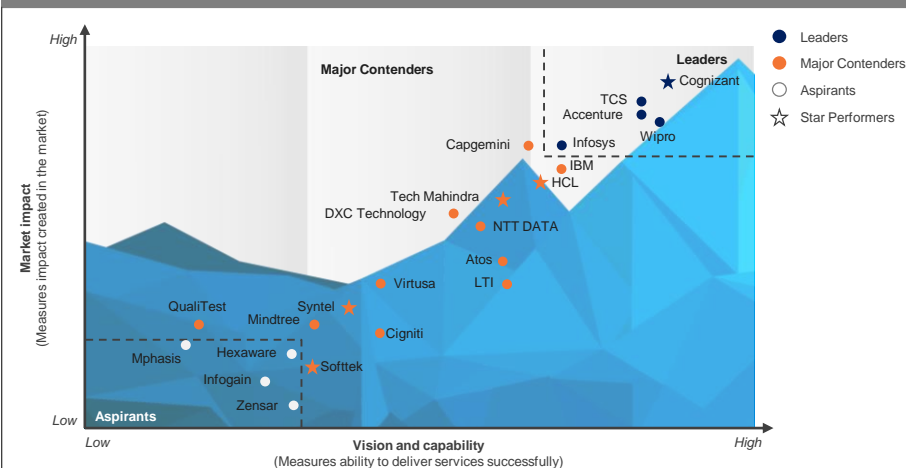
Assessment for IBM and Mindtree excludes service provider inputs on this particular study, and is based on Everest Group's estimates that leverage its proprietary Transaction Intelligence (TI) database, ongoing coverage of these service providers, service provider public disclosures, and interaction with buyers

The source of all content is Everest Group unless otherwise specified

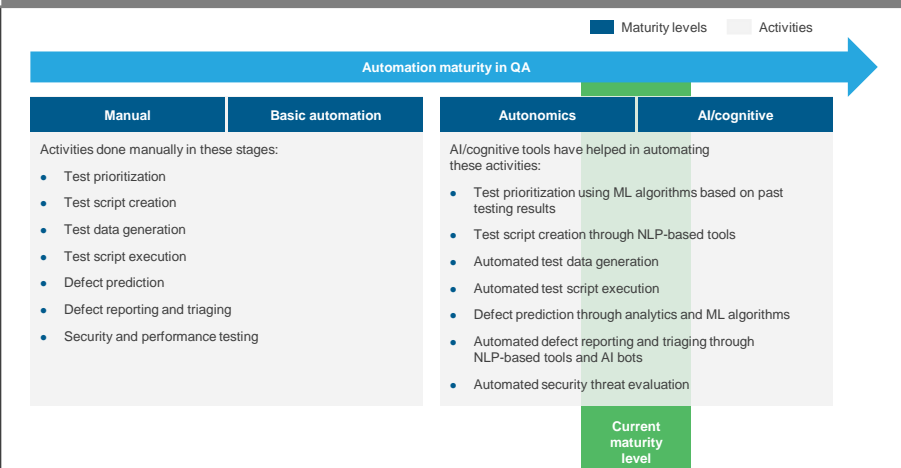
Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information we collect that is contract specific will only be presented back to the industry in an aggregated fashion

This enterprise QA services PEAK Matrix™ assessment covers 23 service providers capabilities and key market trends

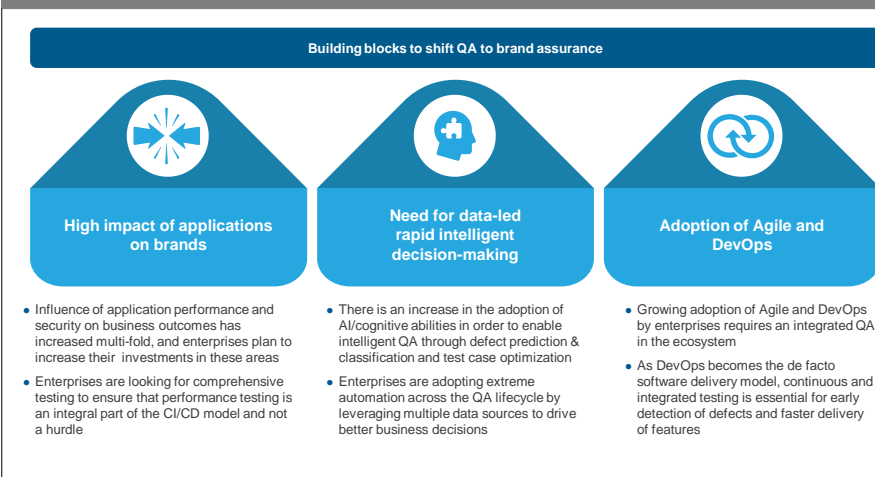
Everest Group PEAK Matrix™ for enterprise QA services



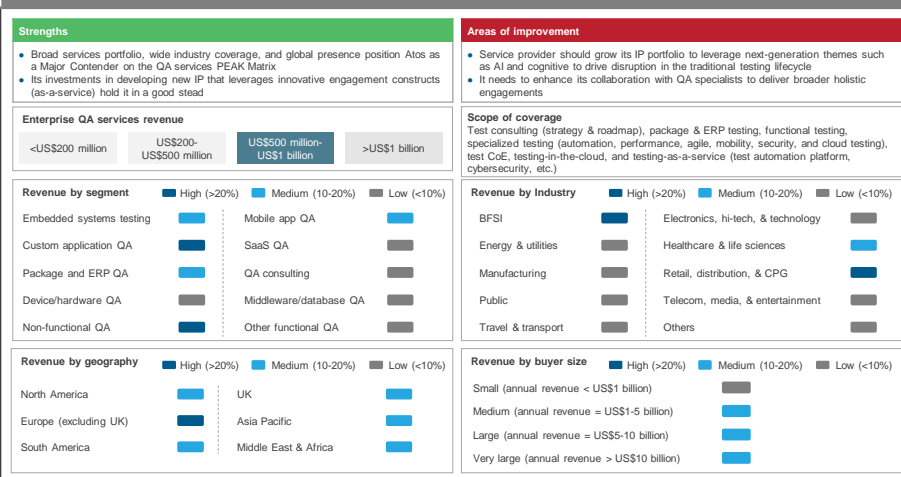
Automation maturity in QA



Building blocks to shift QA to brand assurance



Service provider QA services profile



Research calendar – Application services

Published
 Planned
 Current release

Flagship Application Services reports

Release date

Application Modernization Services – PEAK Matrix™ Assessment and Market Trends 2017	November 2017
Enterprise QA Services PEAK Matrix™ Assessment 2018: Quality Assurance to Brand Assurance: AI Driving the Evolution	May 2018
Application Services Annual Report 2018	Q2 2018
GDPR Solutions PEAK Matrix™ Assessment and Market Update 2018	Q2 2018
DevOps PEAK Matrix™ Assessment and Market Update 2018	Q3 2018
Automation in Application Dev-test PEAK Matrix™ Assessment and Market Update	Q3 2018

Thematic Application Services reports

Reimagining Application Delivery with Enterprise Crowd-development	Dec 2017
Application Performance in the Digital Age: Adopting AI is Not Optional	January 2018
Upcoming Contract Renewals – Application Services 2018	February 2018
The Great Digital Divide: Is Customer Dissatisfaction the New Normal?	March 2018
Closing the Gap – The Future of IT Skills in the United States	April 2018
Reimagining Enterprise IT Services Sourcing	May 2018
AI Trailblazers	Q2 2018
Big Tech Wars: Enterprise Platforms	Q3 2018
Securing the SDLC: Now is a Good Time to Start	Q3 2018

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Additional application services research references

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

1. **Application Performance in the Digital Age: Adopting AI is Not Optional** ([EGR-2018-32-V-2539](#)); 2018. Enterprises spend over US\$5 billion in performance testing. This spend can be significantly reduced by leveraging AI systems. This research is focused on how AI systems can assist designers, architects, developers, testers, and the operations teams to significantly enhance application performance
2. **Independent Testing Services – PEAK Matrix™ Assessment & Profiles Compendium: “Reports of QA’s Death Are Not Exaggerated”** ([EGR-2017-4-R-2170](#)); 2017. Service providers are strengthening their capabilities to deliver end-to-end assurance to their clients. They are investing in next-generation technologies to stay ahead of the adoption curve and challenge the traditional models of independent testing. This Everest Group research presents an assessment and detailed profiles of 22 IT service providers featured on Everest Group’s PEAK Matrix for independent testing services for 2017. The PEAK Matrix is a composite index of a range of distinct metrics related to a service provider’s scale, scope, technology/domain investments, delivery footprint, and resultant market success in the context of a given services function

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