



# Next-generation Quality Assurance (QA) Services PEAK Matrix™ Assessment 2020

Application Services

Market Report – November 2019: Complimentary Abstract / Table of Contents

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- Tracking services | Service providers, locations, risk
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# Background of the research

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## Background of the research

Enterprises aiming to jump on the transformation bandwagon are exploring new-age technologies to provide them the differentiating edge, enabling business model evolution and expansion of business boundaries. However, to support the quest of achieving the desired benefits without impairing existing operations, comprehensive Quality Assurance (QA) for these next-generation technologies becomes essential. Next-gen QA is not only limited to the knowledge of emerging technologies, but also involves quality engineers with more agile, shift-left, inclusive, and automation-led delivery model. To help enterprises in their journey, service providers' trifecta – people, process, and technology – needs to be aligned toward emerging business imperatives. Also, as quality engineers permeate further in the overall development process, in a multi-vendor construct, aspects such as coordination, responsibility sharing, and timeline management require mature engagement and governance models.

In this research, we present an assessment and detailed profiles of 19 next-gen QA service providers featured on the next-gen QA services PEAK Matrix™. Each service provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, and case studies. The assessment is based on Everest Group's annual RFI process for calendar year 2019, interactions with leading 19 services providers, client reference checks, and an ongoing analysis of the next-gen QA services market.

## Scope of this report:

- **Services:** Next-gen QA services
- **Geography:** Global
- **Service providers:** 19 leading QA services providers

**This report includes the profiles of the following 19 leading next-gen QA service providers featured on the next-gen QA services PEAK Matrix:**

- **Leaders:** Accenture, Atos, Capgemini, Cognizant, TCS, and Wipro
- **Major Contenders:** Cigniti, DXC Technology, Hexaware, HCL Technologies, Infogain, Infosys, LTI, NTT DATA, and UST Global
- **Aspirants:** GAVS, Softek, Tavant, and TestingXperts

# Overview and abbreviated summary of key messages

This report examines the global next-generation quality assurance service provider landscape and its impact on the quality assurance market. It focuses on service provider position and growth in the next-generation quality assurance market, changing market dynamics and emerging service provider trends, assessment of service provider delivery capabilities, and key next-generation quality assurance service provider profiles. It also identifies the key implications of the research findings for buyers and service providers.

Some of the findings in this report, among others, are:

## Changing market dynamics

- Enterprises are looking at exploring new-age technology to achieve differentiation and operational efficiencies
- The scope of next-gen technology paradigm is evolving with quality engineers permeating further left in the overall development process

## Emerging service provider trends

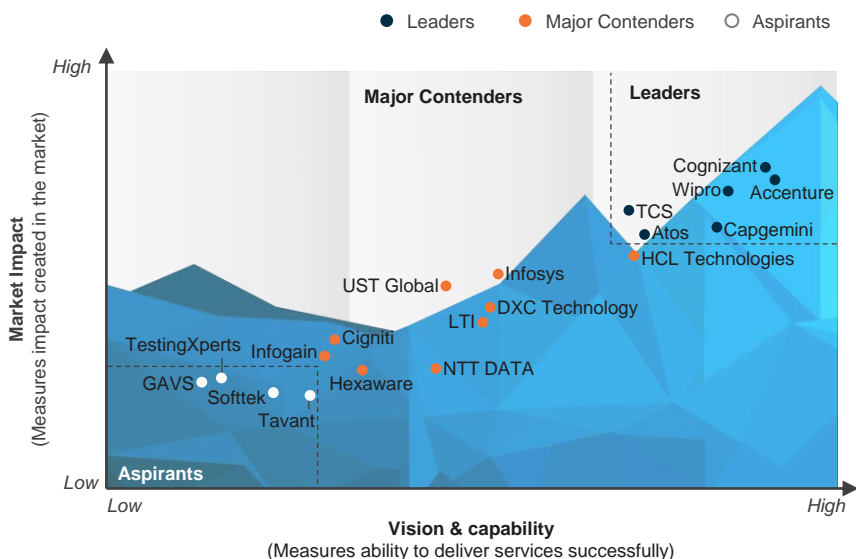
- Leading service providers are investing in next-gen QA area by setting up labs and investing in talent transformation program to reskill QA talent for next-gen QA
- Service providers are investing in proprietary tools and developing capabilities around automation and AI to deliver QA services

## Service provider delivery capability

- Next- gen QA service providers can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Accenture, Atos, Capgemini, Cognizant, TCS, and Wipro are the current Leaders in the global next-generation quality assurance services market. However, several service providers are emerging as Major Contenders

# This study provides an assessment of the leading providers of next-generation quality assurance services

## Assessment of Next-Generation Quality Assurance Service Providers



Note 1 PEAK Matrix specific to next-gen QA services

Note 2 Assessments for Softtek includes partial inputs from the service provider, and is based on Everest Group's estimates that leverages its proprietary data assets, service provider public disclosures, and interaction with buyers

## Capability assessment

Illustrative example

Measure of capability: ● High ○ Low

Service provider	Market impact				Vision & capability				
	Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
Service provider 1	●	○	●	●	●	○	●	●	○
Service provider 2	○	○	○	○	○	○	●	○	○
Service provider 3	○	●	○	●	●	○	○	○	●
Service provider 4	○	○	●	●	●	○	●	○	●
Service provider 5	●	●	○	●	●	○	○	○	○
Service provider 6	○	○	○	○	○	○	○	○	○
Service provider 7	○	○	●	○	○	○	●	○	○
Service provider 8	○	○	○	○	○	○	○	○	○
Service provider 9	○	○	●	○	●	○	●	○	○

## Everest Group's remarks on service providers

Illustrative example

Measure of capability: ● High ○ Low

Market impact				Vision & capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
●	●	●	●	●	○	●	○	○

### Strengths

- Service provider 1, has a good blend of internal portfolio of solutions and a strong partner ecosystem to deliver effective solutions
- It has a good number of multi-country as well as single-country clients across the world

### Areas of improvement

- Service provider 1 should increase offerings of value-added services such as employer branding, talent communities and workforce planning
- It should try to expand into larger multi-country deals and also scout for engagements in other Asia Pacific markets to strengthen its presence in the region

# Research calendar – Application Services

■ Published   ■ Planned   □ Current release

## Flagship Application Services reports

Release date

GDPR Services: Gross Disconnect in Perception and Reality – Services PEAK Matrix™ Assessment 2018 .....	June 2018
Application Automation Services PEAK Matrix™ Assessment and Market Trends 2019: AI Alone Won't Help – Align Strategy to Realize Benefits .....	Feb 2019
Application Services – Annual Report 2019: Balancing The Legacy And New Applications .....	June 2019
DevOps Services PEAK Matrix™ Assessment and Market Trends 2019 – Siloed DevOps is No DevOps! .....	July 2019
<b>Next-generation Quality Assurance (QA) Services PEAK Matrix™ Assessment 2020 .....</b>	<b>November 2019</b>
Application transformation Services PEAK Matrix™ Assessment .....	Q4 2019

## Thematic Application Services reports

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
Upcoming Contract Renewals - Application Services 2019 .....	January 2019
Assuring Trust in a Converging Life Sciences Ecosystem: The Emerging Role of Quality Assurance .....	February 2019
Upcoming Contract Renewals – Application Services 2020 .....	Q1 2020

Note: For a list of all of our published AS reports, please refer to our [website page](#)



# Additional Application Services research references

The following documents are recommended for additional insight into 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 Automation Services PEAK Matrix™ Assessment and Market Trends 2019: AI Alone Won't Help – Align Strategy to Realize Benefits** ([EGR-2019-32-R-3080](#)); 2019. This research focuses on application automation services and includes a market study of application automation services. In this research, we present an assessment and detailed profiles of 19 application automation service providers featured on the application automation services PEAK Matrix™
2. **DevOps Services PEAK Matrix™ Assessment and Market Trends 2019 – Siloed DevOps is No DevOps!** ([EGR-2019-32-R-3225](#)): DevOps has been gaining traction amongst enterprises to help improve their software development and gain competitive advantage in the market. Service providers are also expected to help enterprises fulfill not just their technical demands but also help them drive measurable outcomes aligned to business objectives. They should lean on advanced automation, collaborative culture, and the principles of infrastructure as code to enable a scaled adoption of DevOps. In this research, we present the assessment and detailed profiles of 20 IT service providers featured on the DevOps services PEAK Matrix™

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