



Application Transformation Services PEAK Matrix™ Assessment 2020

Application Services

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

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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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Background of the research

As enterprises transcend the digital maturity curve, they are increasingly looking to transform their application portfolio to get more value out of their applications. Traditionally driven by CIOs, these transformation initiatives are more and more becoming business outcome-oriented, with greater involvement of non-IT C-suite and business units. Benefits of transformation, such as efficiency, cost reduction, and technology standardization, have become table stakes. Enterprises now expect faster time-to-value, enhanced user-experience, new revenue streams, and scalability through these transformation initiatives. Though the objectives are clear, enterprises increasingly find it difficult to envision their transformation journey due to the lack of knowledge around their critical legacy systems. They often find it difficult to transform their human resource to adopt new processes and technologies to derive full benefits out of the modernized environment.

Service providers take up the very critical task of chalking out the strategy and transformation roadmap for these enterprises. Service providers also provide the necessary expertise through talent, technology solutions, and products to accelerate enterprises' journey of transformation. They are increasingly coming up with innovative funding models and change management strategies to instill confidence among enterprises and realize benefits sustainably.

In this research, we present an assessment and detailed profiles of 24 application transformation service providers featured on the application transformation services PEAK Matrix™. Each service provider profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, as well as two case studies. The assessment is based on Everest Group's annual RFI process for the calendar year 2019, interactions with leading application transformation services providers, client reference checks, and an analysis of the application transformation services market.

Scope of this report:

- **Services:** Application transformation services
- **Geography:** Global
- **Service Providers:** 24 leading application transformation service providers

This report includes the profiles of the following 24 application service providers featured on the application transformation services PEAK Matrix:

- **Leaders:** Accenture, Cognizant, HCL, Infosys, TCS, Wipro
- **Major Contenders:** Atos, CSS Corp, DMI, DXC, LTI, Mphasis, NTT DATA, Softtek, Sopra Steria, Stefanini, Virtusa, and Zensar
- **Aspirants:** Gavs, Happiest Minds, Marlabs, Sasken, Sonata Software, Wizeline

Overview and abbreviated summary of key messages

This report examines the global application transformation service provider landscape and its impact on the application transformation market. It focuses on service provider position and growth in the application transformation market, changing market dynamics and emerging service provider trends, assessment of service provider delivery capabilities, and key application transformation 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 investing in application transformation initiatives to keep up with the evolving market dynamics. Enterprises are increasingly seeing application transformation as the core in their journey towards digital transformation
- Enterprises are engaging with service providers to ensure a smooth transition from their legacy applications to a modern one

Emerging service provider trends

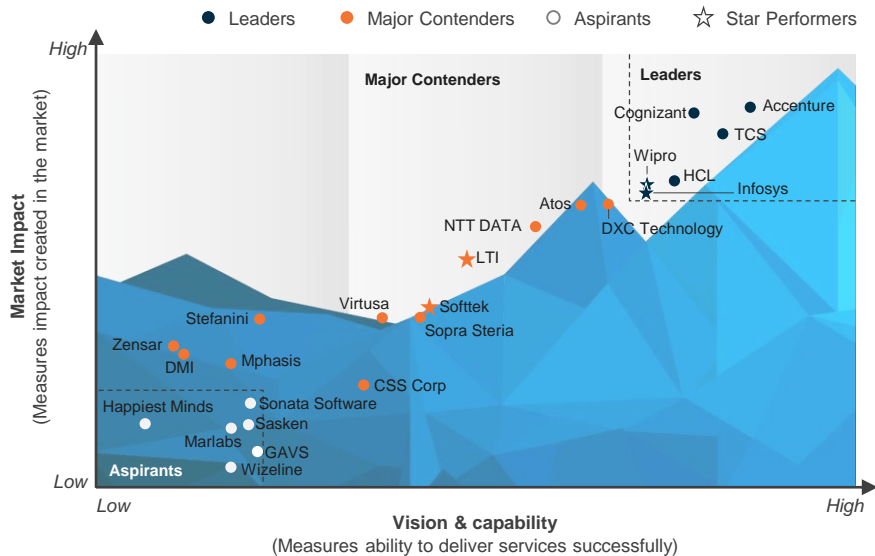
- Leading service providers act as business transformation partners to help enterprises in their journey
- Service providers are investing in proprietary tools and frameworks to accelerate the application transformation and help enterprises overcome challenges such as change management and skill gap

Service provider delivery capability

- Application transformation service providers can be categorized into Leaders, Major Contenders, and Aspirants on a capability-market-share matrix
- Accenture, Cognizant, HCL, Infosys, TCS, Wipro are the current Leaders in the global application transformation services market. However, several service providers are emerging as Major Contenders

This study provides an assessment of the leading providers of application transformation services

Assessment of Application Transformation Service Providers



Note 1: PEAK Matrix specific to application transformation services
 Note 2: Assessment for Sopra Steria 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
 Confidentiality: Everest Group takes its confidentiality pledge very seriously. Any information that is contract-specific will be presented back to the industry only in an aggregated fashion
 Source: Everest Group (2019)

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 robust project delivery capability and has invested in developing in-house IP assets
- It has strong change management capabilities to ensure end to end application transformation services for enterprises

Areas of improvement

- Service provider 1 should increase offerings of value-added services such as 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
Next-generation Quality Assurance (QA) Services PEAK Matrix™ Assessment 2020	November 2019
Application Transformation Services PEAK Matrix™ Assessment 2020	December 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 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 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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