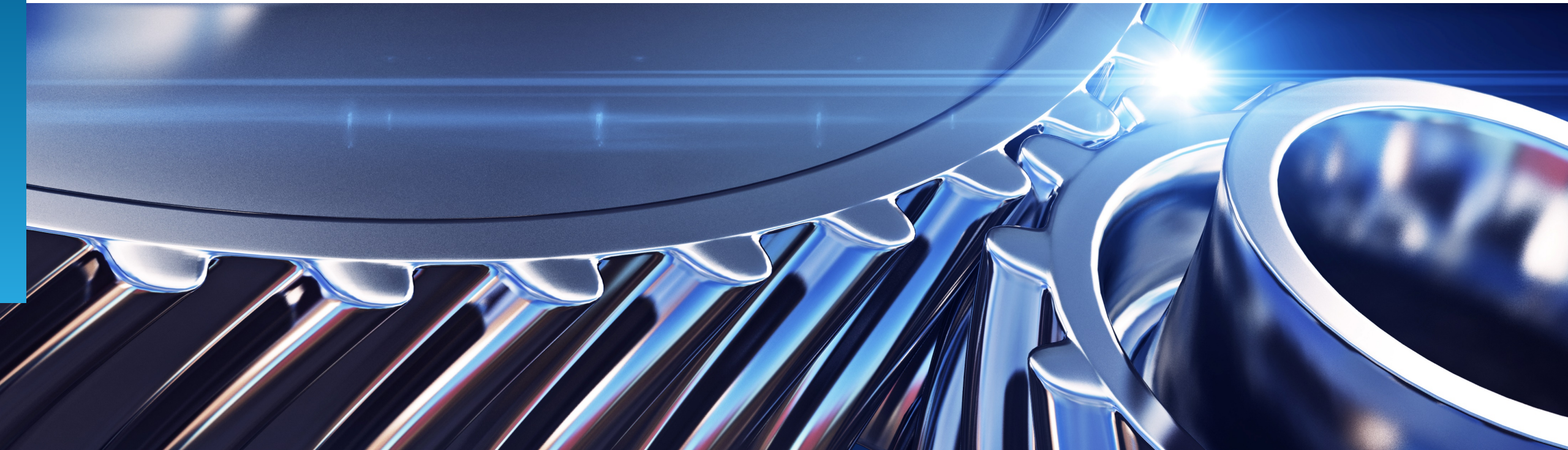# Reaching New Frontiers in Experience-centricity and Resilience: Software Product Engineering Service Provider Compendium 2021

May 2021: Complimentary Abstract / Table of Contents

EGR-2021-40-CA-4354

Our research offerings for global services

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- 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

Membership information

- This report is included in the following research program(s)
  – Engineering Services
- If you want to learn whether your organization has a membership agreement or request information on pricing and membership options, please contact us at **info@everestgrp.com**

Contents

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Background and introduction of the research

The proliferation of software into products, platforms, and processes across all domains has helped unlock new horizons of experience-centricity. Enterprises' software products and platforms are experiencing constant evolution that has led to a multitude of challenges, primarily:

- Developing robust and secure products that are resilient against vulnerabilities and uncertainties such as the COVID-19 pandemic
- Ensuring speed-to-market and differentiation, with user-experience-centered software products
- Keeping pace with ever-evolving software products and changing customer expectations and demand
- Leveraging data to generate new revenue streams and drive efficiency in software product engineering

These challenges have fueled the need to establish a compelling ecosystem of partners, and engineering service providers are actively enhancing their capabilities and offerings to help enterprises tackle these challenges in their software product engineering journey to create experience-centric, secured, and resilient next-generation software products.

This research, the third edition of Everest Group's Software Product Engineering PEAK Matrix® Assessment, evaluates 31 engineering service providers, features them on the PEAK Matrix®, and shares insights on enterprise sourcing considerations. The study is based on RFI responses from service providers, interactions with their software product engineering leadership, client reference checks, and an ongoing analysis of the engineering services market.

The report includes detailed profiles of the following 31 leading engineering service providers featured on the Software Product Engineering PEAK Matrix®:

- **Leaders:** Accenture, Capgemini, Cognizant, HCL Technologies, Infosys, TCS, Tech Mahindra, and Wipro
- **Major Contenders:** Aspire Systems, Brillio, Cybage, EPAM, GlobalLogic, Globant, Happiest Minds, HARMAN Connected Services, Incedo, Infogain, Innominds, Itransition, Mindtree, Mphasis, Persistent Systems, Sonata Software, UST, and Virtusa
- **Aspirants:** Daffodil Software, Dextra Technologies, eInfochips, Intellias, and TO THE NEW

Scope of this report:

Geography
Global

Service providers
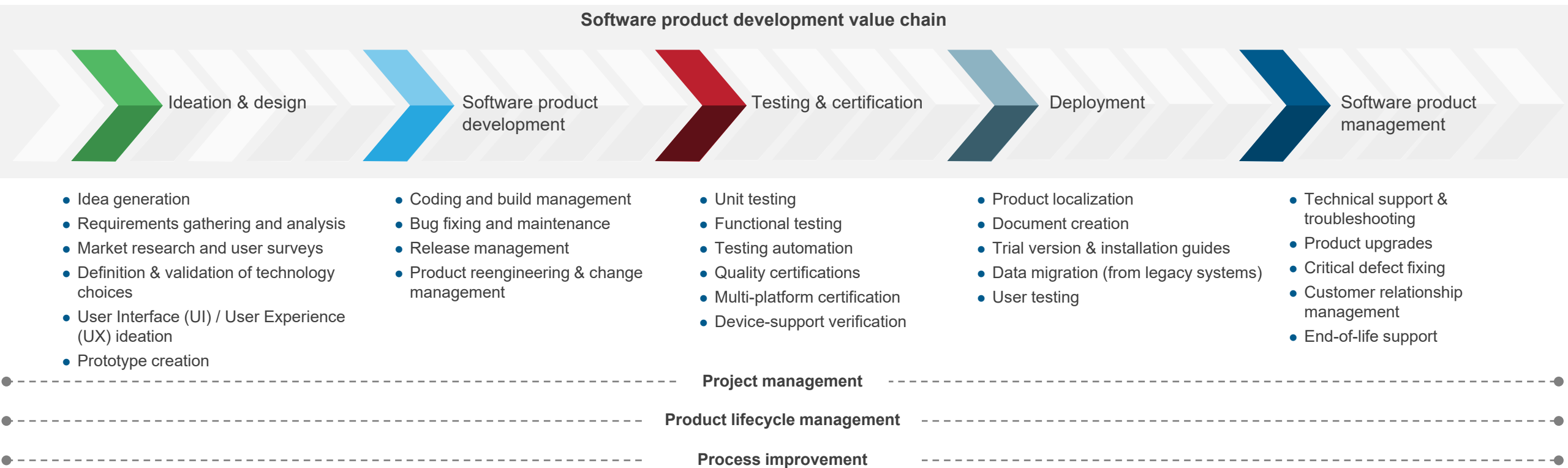31 leading broad-based and pure-play engineering service providers

Services
Software product engineering services

The report focuses on software product engineering services and offers insights into prominent service providers operating in this space

Software product engineering services pertain to development, testing, and maintenance of software products[*]

Software product development value chain

Ideation & design → **Software product development** → **Testing & certification** → **Deployment** → **Software product management**

Ideation & design	Software product development	Testing & certification	Deployment	Software product management
• Idea generation • Requirements gathering and analysis • Market research and user surveys • Definition & validation of technology choices • User Interface (UI) / User Experience (UX) ideation • Prototype creation	• Coding and build management • Bug fixing and maintenance • Release management • Product reengineering & change management	• Unit testing • Functional testing • Testing automation • Quality certifications • Multi-platform certification • Device-support verification	• Product localization • Document creation • Trial version & installation guides • Data migration (from legacy systems) • User testing	• Technical support & troubleshooting • Product upgrades • Critical defect fixing • Customer relationship management • End-of-life support

- - - - - - - - - - - - **Project management** - - - - - - - - - - - -

- - - - - - - - - - - - **Product lifecycle management** - - - - - - - - - - - -

- - - - - - - - - - - - **Process improvement** - - - - - - - - - - - -

[*] In the engineering services value chain, software product engineering services include:
- Development of Commercial Off The Shelf (COTS) products for enterprises
- Development of customer-facing software/portals/applications that are meant for revenue generation or service delivery

Please note that system integration services, development of custom applications for mid-/back-office operations, services offered for embedded software development, and services offered for development of non-commercial products are excluded from the scope of this assessment.

The software product engineering service provider compendium report has profiles and buyer case studies for 31 leading engineering service providers

Service Provider | software product engineering services profile (page 1 of 4)
Everest Group assessment – Le

Market impact		
Market Adoption	Portfolio mix	Value de

Strengths
- Dedicated efforts toward driving thought leadership
- Perceived as a strong consulting and advisory par product engineering knowledge
- Robust portfolio of multiple vertical-focused propri effectively cross-pollinated across industries
- Exhibits high commercial flexibility and willingness such as risk-reward, revenue sharing, and IP-relat

Service Provider | software product engineering services profile (page 2 of 4)
Overview

Vision & strategy
Service Provider envisions to combine strategic advice, op and technology expertise to reduce time-to-market, improv software products, and optimize the performance of end-to engineering operations. The firm aims to leverage a produc compelling value proposition to software product owners fo expertise across the product life cycle. Service Provider m engineering as key elements of its strategy, and it plans to partnership ecosystem to accelerate cloud-native product e also plans on optimizing the value and management of exis at scale.

Software product engineering services revenue (Oct 20

<US$100 million	US$100-250 million	US$250-500 million

YoY growth rate in software product engineering servi (Oct 2019-Sept 2020)

<10%	10-20%	20-30%

Revenue derived from cloud engineering initiatives (O

<20%	20-35%	35-50%

Service Provider | software product engineering services profile (page 3 of 4)
Case studies and solutions

Case study 1	Engineering a modern solution for IT encryption

Business challenge
Developing a cloud-agnostic solution that overcomes the challe security solution, primarily difficult maintenance and upgradatio deployment and upgradation, as well as lack of support for IoT.

Solution and impact
Service Provider developed a next-generation solution within a web-based user interface. The platform had new accessibility la secure and easy-to-manage solution was designed, architected Service Provider implemented new API back-end as a modern r provided support for pluggable software and hardware security

Case study 2	Carving out an end-of-life product fro technology company

Business challenge
The client wanted Service Provider to own its End-of-Life (EOL) of a new storage product to its engineering portfolio. This was a few strategic products to expand market share and sunset or di

Solution and impact
Service Provider took complete ownership of software product s portfolio. The firm provided scaled escalation engineering suppo service packs and hot-fixes, and quality engineering. Delivery te US and India. Service Provider rapidly scaled up to economicall had significant revenue and freed up highly experienced engine development.

Service Provider | software product engineering services profile (page 4 of 4)
Investments and partnerships

Key alliances and partnership (representative list)

Company	Details
Partnership 1	A partnership to help companies build and operate their products as a service, transform and sustain legacy products for the connected digital world, and maximize returns
Partnership 2	A collaboration to develop a joint solution as a part of CA Unified Infrastructure Management; this solution is leveraged by customers to monitor key metrics
Partnership 3	A relationship to enable enterprises to adapt, innovate, and change with differentiated solutions and accelerate success with cloud applications, platforms, and transformation services
Partnership 4	A plethora of alliances with multiple analytics ecosystem providers to enhance capabilities in developing big data and analytics products
Partnership 5	An alliance that focuses on developing applications that capitalize on integrated network and cloud capabilities
Partnership 6	An alliance that focuses on helping clients meet business needs to create high-value cloud-based services and solutions designed to foster innovation, growth, and profitability
Partnership 7	A partnership focused on helping customers build and deliver world-class software along with publishing World Quality Report that focuses on the future of improving the quality of software products & development process. It helps clients adopt agile & DevOps methodologies and rethink their V&V approach to meet the challenges of the software products business
Partnership 8	A partnership that helps bring new and innovative solutions to clients using ubiquitous software and the expertise for engineering, continuous integration, and maintenance services
Partnership 9	A system integration and co-development partnership across multiple areas including product support and bug fixing, cloud-based data-driven manufacturing performance management solutions, driving co-innovation to augment/complement SAP software solutions for specific industry use cases, and building & marketing cloud solutions

Recent software product engineering services investments/acquisitions (representative list)

Investment/target	Company description
Lab investment	Launched a 5G lab on as-a-service model for telecommunication companies, enterprises, and OEMs that are instrumental in bringing 5G and Edge to software products
Acquisition 1	Acquisition to enhance footprint in software & internet vertical, portfolio of assets, North American geography, and key marquee client partnerships
Acquisition 2	Acquisition that focuses on digital user and customer experiences, digital strategy, and the design of next-generation IoT and software-enabled products across sectors
Acquisition 3	Acquisition that specializes in growth-stage technology companies and cloud-native products, and expands expertise in Silicon Valley, the US, and Eastern Europe.
Acquisition 4	Acquisition that focuses on digital business transformation services in North America with clientele including GoPro, Titleist/FootJoy, Timex, Charlotte Russe, Vince, and Bayou Steel
Infrastructure investment	Invested in an automated lab provisioning infrastructure for DevSecOps enablement
Platform investment	Invested in a robotics-as-a-service platform for testing software products with extensive physical user interaction
Lab investment	Enhanced usability labs that incorporate design thinking for next-generation users

Research calendar
Engineering Services

Flagship Engineering Services reports	Release date
Industry 4.0 Services PEAK Matrix® Assessment: the Transformational Leap in Cyber-physical Convergence	September 2020
Reaching New Frontiers in Experience-centricity and Resilience: Software Product Engineering Services PEAK Matrix® Assessment 2021	March 2021
Semiconductor Engineering Services PEAK Matrix® Assessment 2021: Enabling the Hyper-connected Intelligent World	March 2021
A Transformational Leap in Cyber-physical Convergence – Industry 4.0 State of the Market Report 2021	April 2021
Reaching New Frontiers in Experience-centricity and Resilience: Software Product Engineering Service Provider Compendium 2021	**May 2021**
Automotive Engineering Services PEAK Matrix® Assessment 2021	Q2 2021
5G Engineering Services PEAK Matrix® Assessment 2021	Q3 2021

Thematic Engineering Services reports	Release date
Engineering the 5G World	June 2020
Engineering Services Skills Handbook: Preparing for Next Wave of Growth in Global ER&D	July 2020
Leading the Pack: Trends for the Top 200 Engineering Research & Development (ER&D) Enterprises 2020	January 2021
ER&D in 2021	February 2021
Digital Twins and their adoption across industries	February 2021
The Role of Global Business Service (GBS) Organizations in the Automotive Industry: What Lies Ahead?	March 2021
Engineering Services Enterprise Pulse: Are Engineering Enterprises Truly Happy with Their Service Providers?	April 2021
Engineering Services Top 50	Q2 2021
Engineering Services Talent Handbook – APAC	Q2 2021

Note:　For a list of all of our published ES reports, please refer to our website page

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