A research report comparing provider strengths, challenges and competitive differentiators

Next-Gen Application Development & Maintenance (ADM) Services

Agile Development

USA 2019 Quadrant Report
About this Report

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The research and analysis presented in this report includes findings from the ISG Provider Lens™ program and ongoing ISG Research programs, interviews with ISG advisors, briefings with services providers and analysis of publicly available market information from multiple sources. The data collected for this report represents information that was current as of March 2018. ISG recognizes that many mergers and acquisitions have taken place since that time, but those changes are not reflected in this report.

All revenue references are in U.S. dollars ($US) unless noted.

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EXECUTIVE SUMMARY

Enterprises in the U.S. are at the forefront of adopting and integrating Next-Gen ADM technologies. Enterprise-wide adoption of concepts such as DevOps is helping clients:

- Achieve agility and coordination among development, testing and production functions
- Develop a culture where application updates are shaped by user feedback
- Eliminate silos and realize maximum value across the application lifecycle
- Bridge the efficiency voids across business processes

Next-Gen ADM

- **Digital labor is making the existing workforce more productive:** Digital labor goes far beyond the realms of bot-based automation, to include diagnostic, predictive and remediating capabilities using intelligence acquired over time to solve non-linear problems. Digital labor is enabling the current applications development and maintenance (ADM) workforce to focus on higher-value work. For example, an analyst can now spend more time analyzing data, rather than checking the data’s authenticity, quality and applicability.

Higher demand for hybrid cloud environments: Enterprises are increasingly creating cloud-native applications that can be moved directly to the public cloud. However, security and regulatory limitations have created a pool of applications that still resides in dedicated private clouds. Hence, enterprises are seeking providers that can accomplish migration and maintenance across cloud environments.

Business-based metrics to measure results: To divert budgets toward digital transformation, enterprises are looking for methods to quantify Next-Gen services and their direct impact on business. The commercial contracting structures and preferences are shifting from traditional input-based transactional models to ones that are built on business-based metrics.

Agile Development

- **DevSecOps becomes the new normal:** DevSecOps has replaced DevOps across the board. Enterprises and providers alike are realizing that security cannot be an afterthought. Thus, during early DevOps implementation phases, security principles are being incorporated as a default feature.
Executive Summary

- **Rapid application development is on the rise**: As enterprises become more agile, they have a growing necessity for tight integration among their business, engineering and operations organizations. These organizations are required to maintain rapid development cycles to quickly add features to existing offerings and release new ones to the market. Such enterprises need to partner with service providers that can offer a globally distributed agile organization that balances the cost dynamics with the need for speed.

- **Full-stack developers for application development**: Providers are looking to full-stack developers for application development to avoid unnecessary coordination cycles. Having a single resource with a 360-degree view of the environment can speed the entire development cycle. A full-stack developer is a developer that has knowledge and expertise to work from back-end through front-end application components.

Continuous Testing

- **Test automation as-a-service**: Test automation as-a-service is being advocated as a differentiator to win testing contracts with dominant digital scope. Enterprises are engaging with service providers to build test automation centers of excellence and initially manage them.

- **Domain and vertical integration**: A wide range of testing services are being mapped with industry-specific tools, reusable scripts and accelerators. The services being mapped include test consulting, application testing, application security testing, enterprise solution testing and internet of things (IoT) testing. Moreover, service providers are creating specialized vertical solutions for testing clients.

- **Testing as a technology enabler**: Testing is being viewed as an enabler to emerging technologies. For example, for many IoT projects, service providers and clients are resorting to software in a loop (SIL) and hardware in a loop (HIL) testing approaches to test the real-world performance of connected devices.

- **Increasing demand for full-stack testing engineers**: The desire to achieve continuous testing capability has led to greater demand for full-stack testing engineers. Such resources are expected to have knowledge across test phases. For example, a full-stack engineer might be required to perform test execution automation on Selenium, integrate it with Jenkins for continuous integration, and then provision the test environments in the public cloud and virtual environments.

Next-Gen ADM – BFSI

- **Blockchain technology is finding more use cases in the financial industry**: Interbank use cases are still rare, but banks are making use of the technology to simplify their existing systems and remove process bottlenecks. Blockchain is enabling faster and cheaper settlements and is shaving off a significant portion of the transaction costs, while improving transparency.
Customer intelligence becomes predictor of growth: Advances in data analytics are helping financial institutions meet and anticipate customer needs. Artificial intelligence (AI) is helping run various banking functions, including marketing and sales, wealth management and compliance.

Public cloud becoming the default services model: Non-core functions like customer relationship management (CRM), Human Resources (HR) and Finance and Accounting (F&A) already are being delivered through a cloud-based software-as-a-service (SaaS) model. Gradually, core functions such as payments, billing and credit scoring are being moved to the public cloud.

A design-thinking approach to delivery: A customer-first design is enabling application delivery. As banking consumers are becoming more tech-enabled, e-banking is becoming the primary channel to onboard, serve and retain them. Hence, each service, from account onboarding to loan disbursal, is being designed to decrease customer effort and enhance experience.

Next-Gen ADM – Healthcare & Life Sciences

Data-driven initiatives come of age: Healthcare and life sciences (HCLS) clients are adopting an analytics-driven approach to transformation projects to harness data and generate insights, thereby becoming more customer-centric and optimizing the entire value chain. The sector is also stepping into newer technology areas like industrial machine learning (IML), which uses big data to improve healthcare standards. Such applications could lead to better clinical decisions, lower readmission rates and fewer adverse events.

Accelerated cloud adoption: Cloud resources are addressing process inefficiencies, enabling end-to-end visibility and streamlining commercial operations for various life sciences companies. In the payer and provider segments, cloud adoption is boosting connectedness and information accessibility among practitioners, payers and patients.

Maintenance savings are funding change initiatives: HCLS organizational IT budgets have remained flat for several years. So, there has been more emphasis on reducing discretionary spend for maintenance services by using automation levers, then using the savings to fund business intelligence, cloud migration, data warehousing and platform development engagements.

Next-Gen ADM – Manufacturing

IoT driving efficiencies: The scaled adoption of IoT is enabling predictive maintenance, self-optimizing production and automated inventory management, resulting in lower maintenance, maximized equipment life and uninterrupted production cycles. Although the IoT has far-fetched applications benefits, most use cases still pivot around value chain optimization.
- **The production process**: IIoT and smart factories are not just making the shop floor more agile and efficient, they also are creating higher process compliance and better quality management.

- **Omni-chain disrupting supply chain**: Although in its infancy, a blockchain-based “omni-chain” is being used by manufacturers to connect different processes in the ecosystem. Omni chain is a cloud model that unifies both internal and external processes across extended networks.

- **Rapid increase in enterprise cloud and mobility engagements**: Manufacturers are looking to leverage cloud and mobility to form a connected ecosystem of suppliers, manufacturers, customers and partners.
Introduction

Service providers are augmenting their traditional ADM offerings with emerging technologies and collaborative frameworks to meet their enterprise clients’ objectives. ISG defines such contract types as Next-Gen ADM contracts. This study explores client objectives and assesses provider capabilities to deliver on Next-Gen ADM contracts.

Definition

Service providers are augmenting their traditional ADM offerings with emerging technologies and collaborative frameworks to meet their enterprise clients’ objectives. ISG defines such contract types as Next-Gen ADM contracts. This study explores client objectives and assesses provider capabilities to deliver on Next-Gen ADM contracts.
Definition (cont.)

Scope of the Report

The following areas associated with next-gen ADM are included in this study:

Next-Gen ADM

Like traditional application services, next-gen ADM includes consulting, design, custom development, packaged software integration, operations and testing. However, the scope, delivery mechanism and outcome for such contracts pivot around a value-based approach that focuses on achieving enterprise agility and solving business problems.

This quadrant assesses vendors based on their capability to augment traditional ADM services with emerging technologies and methodologies like agile, DevOps, automation, digital and modernization techniques to deliver application outsourcing projects. It also assesses provider capabilities in incorporating new approaches to develop and deliver applications that focus on business outcomes.

Agile Development

Agile development is an incremental and iterative approach to application development. Because it encompasses frequent and early releases of the working software, the agile methodology is being viewed by enterprise as a medium for attaining enterprise agility.

This quadrant assesses provider capabilities in delivering tangible results through use of various agile methodologies. It looks at how providers use agile development with respect to their overall application development practice.

Continuous Testing

Continuous testing focuses on delivering quality assurance at speed. In terms of technology, it encompasses various aspects of automated testing such as shift-left, end-to-end automation across testing phases. However, in terms of people and processes, it goes a step beyond automation testing to accomplish higher collaboration among QA and development teams so they
Definition (cont.)

can sync with sprint cycles and promote feature-driven testing, responsiveness to change, feedback loops and greater client involvement. Continuous testing is gaining momentum, especially to help enterprises keep pace with their agile and DevOps initiatives.

Service providers in this quadrant are assessed on their progress made and capabilities developed for creating a continuous testing environment with measurable outcomes for their clients.

Next-Gen ADM – BFSI

This quadrant assesses the strength of providers that provide next-gen ADM services to the BFSI industry, which is comprised of banking, diversified financial and insurance companies.

Next-Gen ADM – HCLS

This quadrant assesses the strength of providers that provide next-gen ADM services to the HCLS industry, including healthcare institutions, payers, pharmaceutical, biotech and medical device companies.

Next-Gen ADM – Manufacturing

This quadrant assesses the strength of providers that provide next-gen ADM services to the manufacturing industry, which includes conglomerates, capital goods, construction, consumer durables (like automotive, household appliances), aerospace and defense, materials, semiconductor, technology hardware and equipment companies.
Provider Classifications

The ISG Provider Lens™ quadrants were created using an evaluation matrix containing four segments, where the providers are positioned accordingly.

**Leader**

The “leaders” among the vendors/providers have a highly attractive product and service offering and a very strong market and competitive position; they fulfill all requirements for successful market cultivation. They can be regarded as opinion leaders, providing strategic impulses to the market. They also ensure innovative strength and stability.

**Product Challenger**

The “product challengers” offer a product and service portfolio that provides an above-average coverage of corporate requirements, but are not able to provide the same resources and strengths as the leaders regarding the individual market cultivation categories. Often, this is due to the respective vendor’s size or their weak footprint within the respective target segment.

**Market Challenger**

“Market challengers” are also very competitive, but there is still significant portfolio potential and they clearly lag behind the “leaders”. Often, the market challengers are established vendors that are somewhat slow to address new trends, due to their size and company structure, and have therefore still some potential to optimize their portfolio and increase their attractiveness.

**Contender**

“Contenders” are still lacking mature products and services or sufficient depth and breadth of their offering, while also showing some strengths and improvement potentials in their market cultivation efforts. These vendors are often generalists or niche players.
Rising Star

Rising Stars are mostly product challengers with high future potential. When receiving the “Rising Star” award, such companies have a promising portfolio, including the required roadmap and an adequate focus on key market trends and customer requirements. Also, the “Rising Star” has an excellent management and understanding of the local market. This award is only given to vendors or service providers that have made extreme progress towards their goals within the last 12 months and are on a good way to reach the leader quadrant within the next 12-24 months, due to their above-average impact and innovative strength.

Not In

This service provider or vendor was not included in this quadrant as ISG could not obtain enough information to position them. This omission does not imply that the service provider or vendor does not provide this service.
# Next-Gen Application Development & Maintenance (ADM) Services Cross-Quadrant Provider Listing 1 of 3

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<th>Provider</th>
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**ISG Provider Lens™**

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Next-Gen Application Development & Maintenance (ADM) Services Quadrants
Definition

Agile development is an incremental and iterative approach to application development. Because agile encompasses frequent and early releases of the working software, it is being viewed by enterprises as a medium for attaining enterprise agility.

This quadrant assesses each provider’s capabilities to deliver tangible results through use of various agile methodologies. It also looks at the focus a provider has toward the use of agile development with respect to its overall application development practice.
Observations

- Cognizant's gamut of digital offerings for the U.S. market coupled with its OneAgility™ framework provides a distinct advantage.

- HCL's investments in next-gen platforms, innovation lab and scaled agile delivery centers and enterprise transformation capabilities form its primary strengths in the U.S.

- IBM's client-centric service delivery and agile complementing tools and methods differentiates it from competition.

- Infosys' partnerships with tool and process vendors, asset bases and large agile/DevOps ecosystem helps in catering to the varying agile development needs of client in the U.S.

- KPIT's rapid application development framework, engineering legacy and selective industry focus makes it a specialist provider in the agile development space.

- Mindtree offers an array of agile-enabled services. Its GATE model for distributed agile delivery makes it stand out among peers in the U.S. market.

- Wipro's strength lies in its scaled-agile expertise, DevOps and agile and cloud capabilities.

- Hexaware's technology focus, cross-trained workforce and innovation initiatives in the U.S. makes it a Rising Star.
Cognizant generates the majority of its global agile development revenue from the U.S. Cognizant is investing heavily to transform its internal teams of developers into full stack engineers. Therefore, it has tie-ups with companies such as Pivotal, RedHat and AWS.

**Gamut of digital offerings**: Cognizant has an array of offerings for enterprises seeking digital transformation. The four key offerings and principles include:

- **Insight to code**: This accelerates software development by helping each client unify its business and digital strategies at scale.

- **Greenfield engineering**: This is a cloud-native philosophy with agile practices that uses iterative sprints to assure first-mover advantage by delivering production-ready, tested and secure code.

- **Value stream**: Cognizant experts examine the client's existing application portfolio, assess its economic impact and effectiveness to help the client attain high-level, customer-focused business objectives. It then develops recommendations for maximizing the long-term economic return for the entire portfolio.

- **Application transformation**: By leveraging its labs, Cognizant delivers essential transformation components, including assessment, a prioritization framework, app redesign, restructuring and cloud-native operation via agile and DevOps practices.

**Cognizant OneAgility™**: This is an integrated framework for enterprise agility. The OneAgility™ Lab, one of the core components, is a platform made up of industry products, open source toolsets, SaaS services and templates for best practices and tool chaining to rapidly enable modern IT delivery. The majority of Cognizant's new applications are being developed in agile mode.

**Packaged technology strength**: Cognizant is particularly strong in integrated SAP, Oracle and Pega packaged software products, both on-premise and SaaS.

**Caution**

Cognizant can strike new partnerships in the area of hyper-agile development. It should focus on rapid delivery of minimal viable product (MVP)-based solutions, where it can form alliances with low-code and PaaS providers.
HCL

Overview

HCL’s agile development services revenue was approximately $570 million from the U.S. market in 2017. Its 71 U.S. clients are supported by 8,507 employees engaged in agile development and integration activities.

Strengths

Investment in next-gen platforms: HCL has invested in building a next-gen technology platform and is already engaging with customers on their pilots. HCL CoTrust and HCL ARStudio are examples of its platforms. CoTrust is a blockchain platform that simplifies enterprise blockchain adoption by automating the needs for set up. It supports most of the widely used blockchain implementations including Ethereum and Hyperledger. HCL ARStudio is a platform that focuses on building cross-reality (XR) solutions leveraging various AR implementations. It simplifies augmented reality and virtual reality technology adoption.

Innovation lab and scaled agile delivery centers: Based on the maturity level of its customers and their immediate digital targets, HCL’s approach is to establish innovation and scaled agile delivery centers at strategic locations based on its key customer base. HCL adopts a flexible commercial model that ranges from traditional T&M and fixed cost terms to outcome-based commercials as needed.

Enterprise Transformation: HCL has proven expertise in providing a customer-centric value proposition thereby enabling enterprise transformation. HCL offers modern application development platforms to improve business outcomes, developer productivity and standardization across the enterprise. HCL leverages platforms such as ADVantage products, DryiCE, Kalibre and Academy to enable agile and DevOps ways of working.

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HCL is poised to transform businesses based on its digital platforms, startup innovation initiatives, extensive partner ecosystem and flexible approach to contracting.

Caution

HCL can further invest in building domain-specific industry solutions. Domain expertise is an important consideration for clients that are selecting partners for innovation and next-gen initiatives.
Overview

Almost two-thirds of IBM's engagements are agile-enabled and roughly 90 percent of its development staff is trained on agile frameworks and key agile methodologies like Scrum and Kanban. IBM serves approximately 250 enterprise clients in the Americas via its agile development services.

Strengths

Client-centric service delivery: IBM garage-based services are a great example of how uniquely IBM project teams are organized around user stories rather than based on work-breakdown structure in a “function-based” or “role-based” organization. Contrary to a waterfall structure, where a business analyst defines requirements, a developer develops, a tester tests and operations deploys the application, IBM garage teams take end-to-end ownership of their contribution in terms of user stories, and thus are more aligned to project outcomes.

Agile complementing methods and tools: IBM's ADM-oriented methods and tools have been built to enable agile delivery. For example, Agile@Maintenance is designed for rapid deployment. It drives maturity across the portfolio and reduces application break/fix backlogs. IBM's Lean2Agile catalyzes process improvement and increases client value through lean improvements and agile delivery.

Caution

Given IBM's size and scale and the integration of its services division with other business units, it is very difficult for the company to stay flexible — which is why niche, local and specialist services providers have made strong gains in the ADM and other ITO service towers in recent years.

2019 ISG Provider Lens™ Leader

IBM is best suited for large, global, integrated or bundled engagements in which the client can leverage the company's proprietary tooling, methodologies and software to gain a strong advantage.
Overview
Infosys’ agile development revenue was approximately $1.2 billion from the U.S. market in 2017. It has approximately 21,500 employees that provide ADM services to its 85 U.S. clients.

Infosys has innovation hubs in Dallas, Texas, Raleigh, North Carolina, Indianapolis, Indiana, and Glastonbury, Connecticut, to host project teams closer to customer bases and provide the next-best option to colocation. The Dallas operation currently hosts six Scrum teams for financial institutions.

Strengths

Asset bases: Infosys has established an agile academy for training resources across its India centers and has created web-based remote trainings for the rest of the world. It has a center of excellence for agile and DevOps to research tools, enhance IDP (the company's CI/CD platform) and build innovative solutions (including custom, mainframe, ERP and other packages). Infosys also has an extensive resource pool of coaches to support the needs of the local market and train local delivery teams on agile and DevOps principles.

Partnerships with tool and process vendors: To improve its expertise in high-performing process and technology areas, Infosys has strengthened its vendor partnerships with established players such as IBM, Microsoft, HP, CA and AWS. It also is working closely with a host of niche product vendors, including Atlassian, CloudBees, Tricentis, Redhat and Xebia Labs, to provide end-to-end services. Infosys is a gold partner with SAFe Academy.

Large agile/DevOps ecosystem: Infosys boasts 20,000 FTEs trained on agile methodologies, 10,000 DevOps engineers, 15+ vendor alliances, 20+ agile training programs, a DevOps platform that supports 20 packaged technologies and more than 60 tools, plus the experience of serving more than 1,000 agile engagements in 25+ countries.

Caution
Infosys could further enhance its presence and client base in the utilities industry.

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Infosys has a design thinking-led approach to enterprise agility that helps clients drive agile and DevOps adoption in an integrated way, taking an end-to-end view of the value chain.
**Strengths**

**Rapid application development framework:** KPIT has its own rapid application development platform called FoundationK for custom application development. The platform has a responsive UI, is scalable and secure and supports multiple languages. KPIT has been able to achieve 40 percent reduction in cost and a 25 percent reduction in development time through FoundationK, compared to traditional custom application development.

**Selective industry focus and engineering legacy:** Given its medium size, KPIT prefers specializing and aligning its offerings toward select industries. KPIT serves manufacturing, CPG and retail, energy, healthcare and life sciences industries. It also has a product division that helps it gain more domain expertise within these industries.

**Resources trained across DevOps automation tools:** KPIT has resources trained across all major DevOps automation products including Docker, Git, Puppet, Ansible, Jenkins, SonarSource, Chef, Artifactory, Splunk, SaltStake, Logstash, Maven and Automic.

**Caution**

KPIT could further enhance its offerings for smart applications, business intelligence and analytics, ERP and commercial-of-the-shelf (COTS) products.
Mindtree's application development revenue was approximately $376 million from the U.S. market in 2017, approximately 40 percent of which is constituted by agile development services.

Strengths

**Array of agile-enabled services:** Mindtree provides a gamut of agile services ranging from consulting services (coaching, transformation) to delivery through various means, including PO augmentation and managed services. The company is focusing on enhancing agile-based delivery in areas like data analytics, cloud and COTS applications from Salesforce, SAP and Duck Creek.

**Agile experience:** Mindtree has approximately 4,400 employees working on agile engagements. Of these, there are 3,970 agile engineers, 30 agile coaches, 200 scrum masters and 200 architects. It has an agile center of excellence in Gainesville, Florida. This high-tech ideation and communications hub focuses on agile transformation, agile consulting, agile delivery and digital business.

**GATE model for distributed agile delivery:** GATE stands for Global Agile Teams for Enterprise. Through this model, Mindtree supports onsite agile delivery at clients' premises, onshore at domestic delivery centers, and offshore delivery at one of its India-based delivery centers. The core tenets of the GATE model are to distribute cross-functional teams and not people, distribute work based on the level of collaboration so collaborative work stays close to the client, and using technology enablers to support virtual teams.

Mindtree should look to cross-train its agile resources on multiple agile methodologies so it can offer and recommend different development options based on varying client requirements. Mindtree currently trains on Scrum, SAFe, Kanban, and eXtreme Programming, and leverages its internal proprietary frameworks.

Mindtree is successfully combining agile, DevOps, process and tool automation technologies to achieve faster speed-to-market, thereby, providing higher return on investment to its clients.
Strengths

**Scaled-agile expertise:** Because enterprise-wide agile adoption is a priority for several U.S.-based clients, Wipro advocates scaled agile methodologies to drive agile delivery at the portfolio, program and team levels, wherein business needs are aligned and synchronized through the delivery pipeline. Wipro’s practitioners are trained in more than one agile methodology to help clients realize the value of agile.

**DevOps and agile advisory:** Wipro’s DevOps framework provides a continuous delivery model to provide on-demand IT delivery. Wipro’s Global Agile Model for Enterprise (W-GAME) is a step-by-step model that focuses on aligning people, processes, practices and tools utilizing various lean principles and agile approaches. Wipro also has a proprietary approach called 3D (Discover, Develop and Deliver) to help clients in their agile transformation.

**Cloud capabilities:** Wipro provides solutions to consolidate clients’ application portfolios by moving them to platforms from vendors like Microsoft, Oracle and SAP, or by developing customized, intrinsic platforms. Wipro’s Cloud Integration Kit (CLiK) is an accelerator framework of methods, reusable components and best practices to help customers plan, strategize and execute cloud integration. The company reports it has four dedicated SAP HANA-powered labs, one each in India, the U.S., Germany and Australia.

Caution

Wipro can look to upskill its workforce to fully take advantage of the increasing traction for agile delivery being observed in industries such as BFSI, manufacturing and energy.
RISING STAR: HEXAWARE

Overview

Hexaware's agile development services revenue was approximately $69 million from the U.S. market in 2017.

The company's primary focus areas include product development, automation and employing cloud architecture using agile and DevOps approaches.

Strengths

**FTEs trained across DevOps automation continuum:** Hexaware has a dedicated workforce trained across DevOps automation tools including Docker, Puppet, Ansible, Jenkins, Git, SonarCube, CHEF, Splunk, SaltStack, Logstash, Atomic, Maven and Artifactory.

**Technology focus:** Hexaware has carved out a technology focus, including smart automation (by applying AI and machine learning in focused industries), business transaction innovation using the API economy, and disrupting traditional business models using blockchain technology.

**Capable workforce:** At an organizational level, Hexaware has more than 400 professionals who hold agile certifications (including CSM, CPO, PMI ACP, CSD, SAFe, LKU, and ISTQB-Agile Cert). It has more than 4,000 agile trained consultants, including agile coaches, working across approximately 80 projects.

Caution

Hexaware was rated average for “responsiveness” during project execution in ISG's Voice of the Customer (VoC) Study – 2018.

2019 ISG Provider Lens™ Rising Star

Hexaware has been able to successfully demonstrate a human-centric approach based on design thinking and intelligent process automation to transform the businesses of its enterprise clients.
Methodology
METHODOLOGY

The research study “ISG Provider Lens™ 2019 – Next-Gen Application Development & Maintenance (ADM) Services” analyzes the relevant software vendors/service providers in the US market, based on a multi-phased research and analysis process and positions these providers based on the ISG Research methodology. The study was divided into the following steps:

1. Define the “Next-Gen Application Development & Maintenance (ADM) Services” market
2. Conduct questionnaire-based surveys with service providers/vendor across all trend topics
3. Hold interactive discussions with service providers/vendors on capabilities and use cases
4. Leverage ISG’s internal databases and advisor knowledge and experience (wherever applicable)
5. Analyze and evaluate services and service documentation based on the facts and figures received from providers and other sources.
6. Evaluate based on the following key criteria:
   - Strategy and vision
   - Innovation
   - Brand awareness and presence in the market
   - Sales and partner landscape
   - Breadth and depth of portfolio of services offered
   - Technology advancements
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